

A CRM APPLICATION TO MANAGE THE BOOKING OF CO -LIVING

Name: S.Dikshitha

Email: 2111cs030026@mallareddyuniversity.ac.in

PROJECT ABSTRACT

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

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

What I am learn in this project

INDEX PAGE

Title name	Page no
A Crm Application To Manage The Booking Of Co -living	1
Abstract	
Project Abstract	2
Milestone	---
1.Salesforce	4 - 6
2.Object	6-12
3. Tab	12-14
4.The Lightning App	14-16
5. Fields & Relationships	16-43
6 .Validation rule	43-45
7. Profile	45-48
8 .Roles	48-49
9 .Users	49-52
10.User Adption	52-54
11. Reports	54-56
12. Dashborads	56-57

Milestone1 - Salesforce

Introduction:

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

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

- What Is Salesforce?

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

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

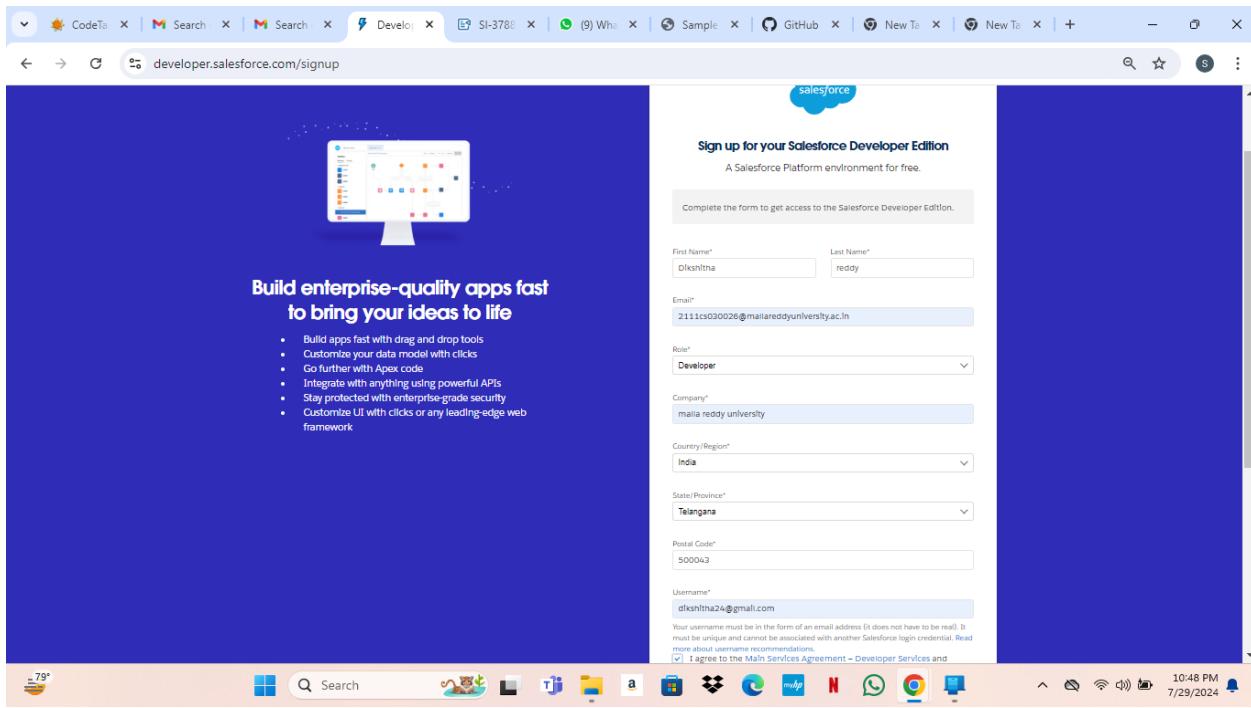
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized

Activity 1- Creating Developer Account

Creating a developer org in salesforce.

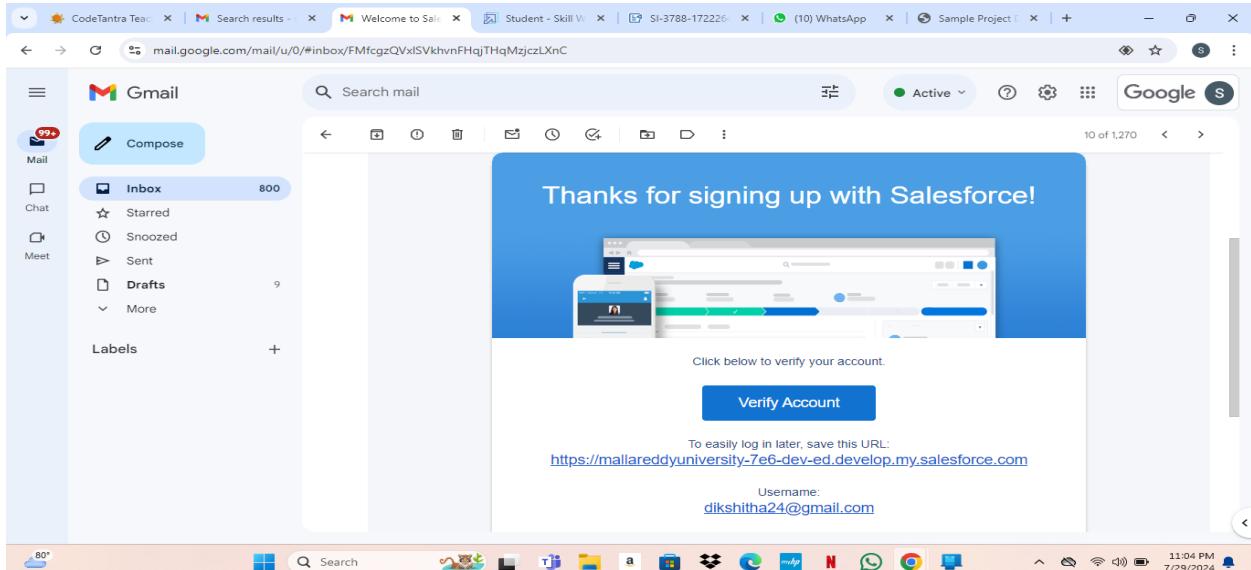
- Clik on link <https://developer.salesforce.com/signup>
- On the sign up form, enter the following details :
 1. First name & Last name
 2. Email
 3. Role : Developer
 4. Company : College Name
 5. County : India
 6. Postal Code : pin code
 7. username

8. finally Click on sign me up after filling these.



Activity 2 - Account Activation

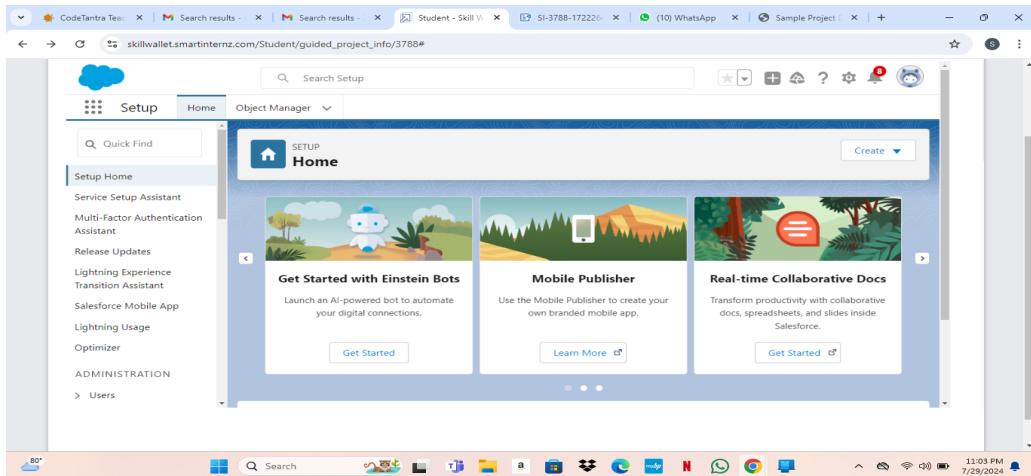
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2 . Click on Verify Account

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

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



Milestone2 - Object

Introduction:

What Is an Object?

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

Salesforce objects are of two types:

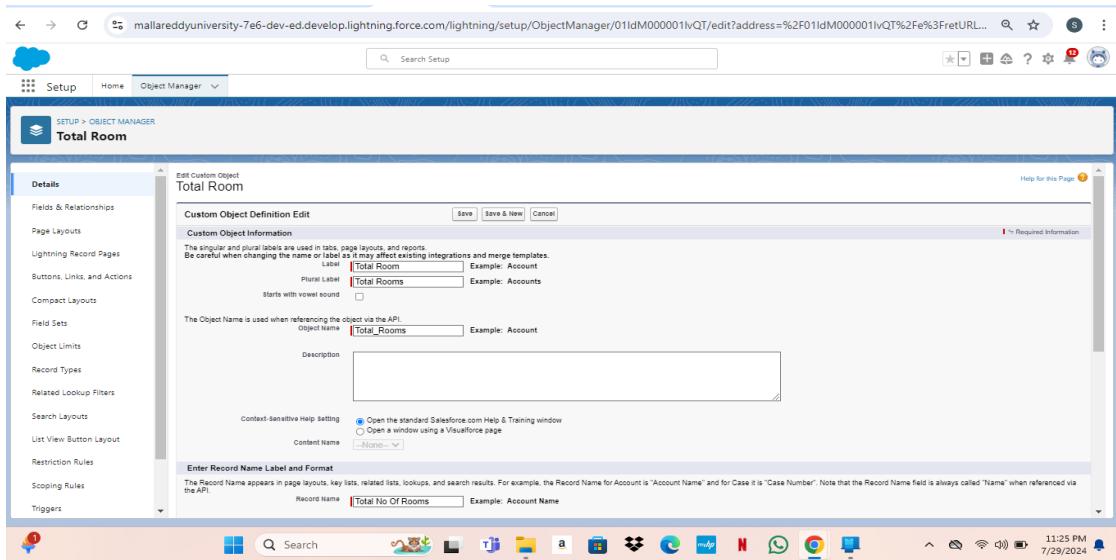
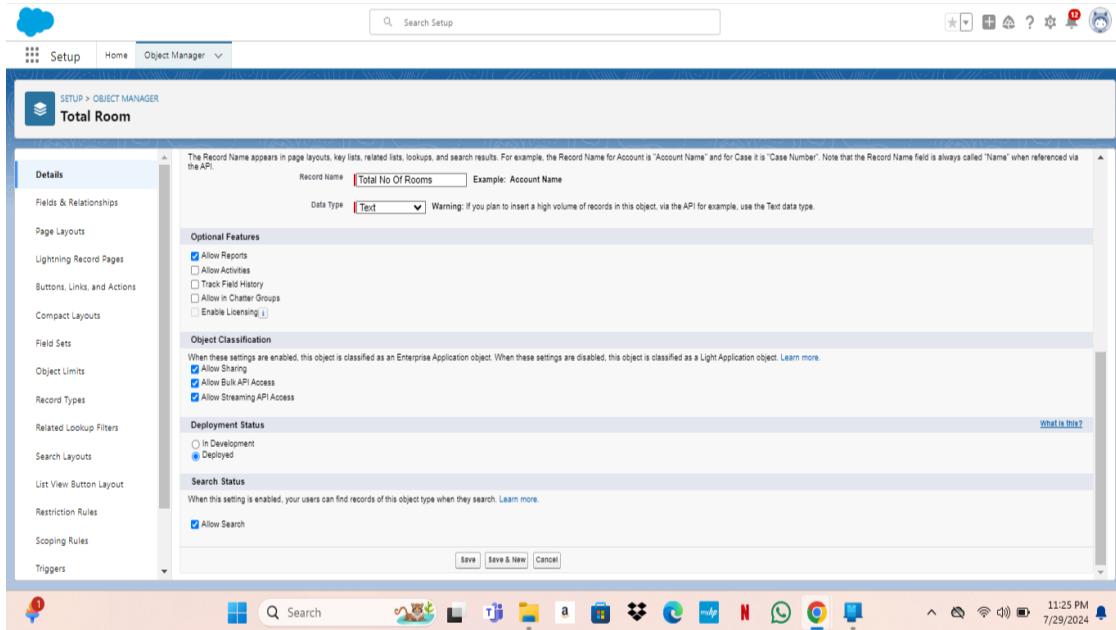
- 1. Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- 2. Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

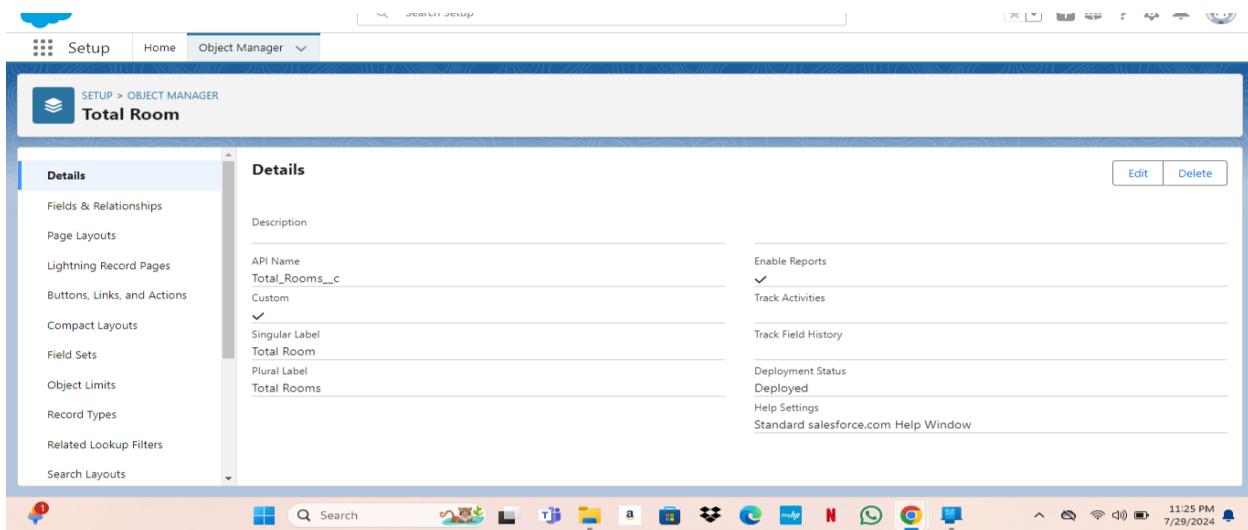
Activity1 - Create a custom object for Total Rooms

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Total Room ".
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.

9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
11. Leave everything else as is, and click Save.

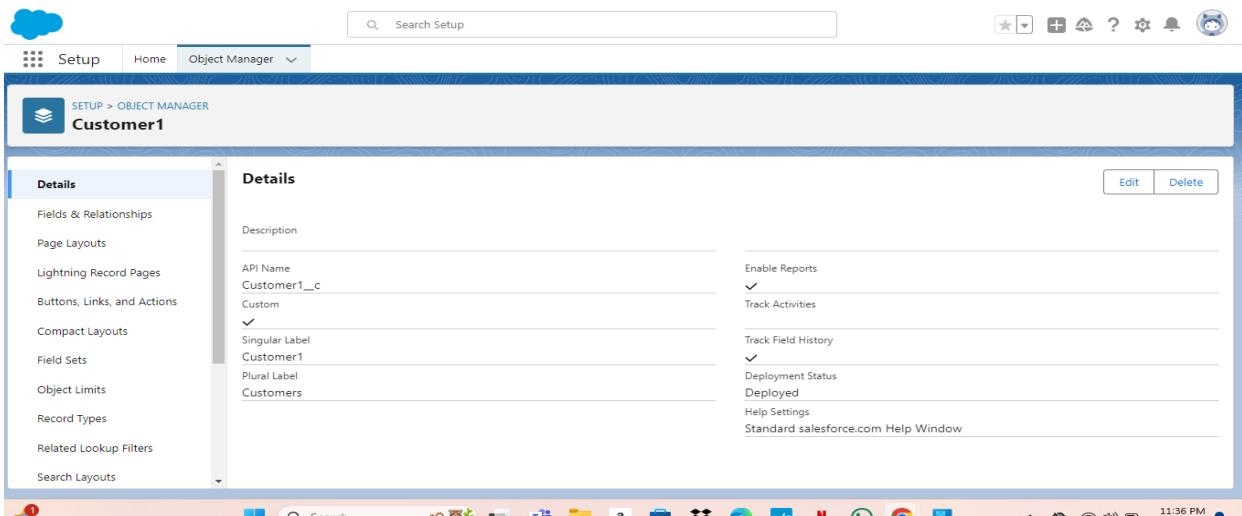




Activity2- Create a custom object for Customer

To create a custom object, follow these steps:

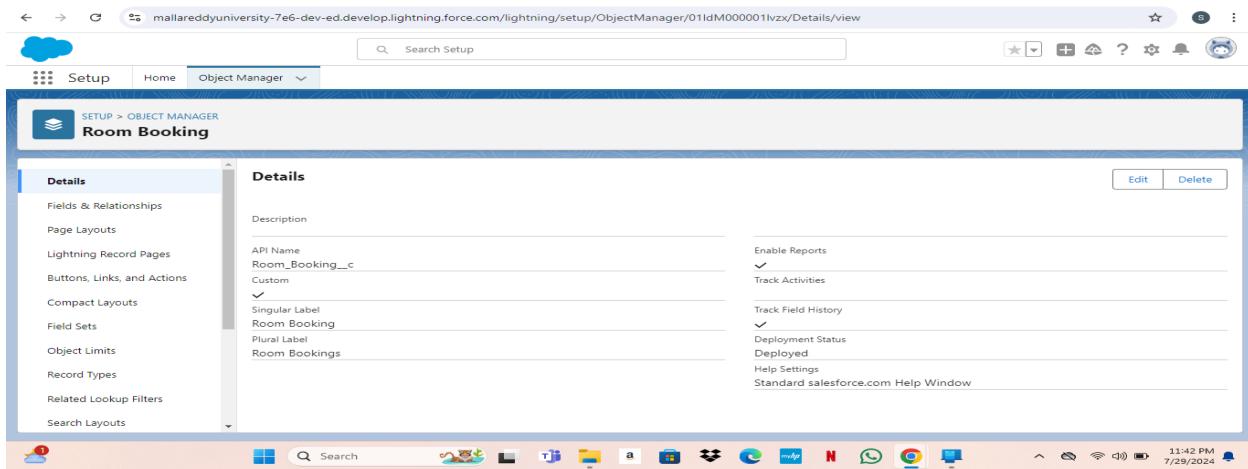
1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Customer1".
4. Fill in the plural label as "Customers".
5. Record name: "Customer Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
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.



Activity3 - 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.

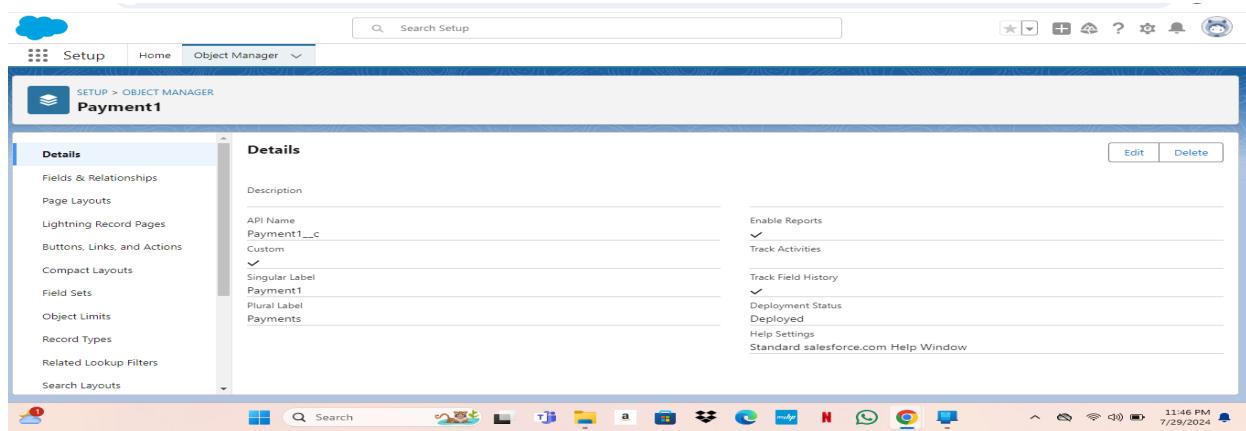


Activity4 - Create a custom object for Payment

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}

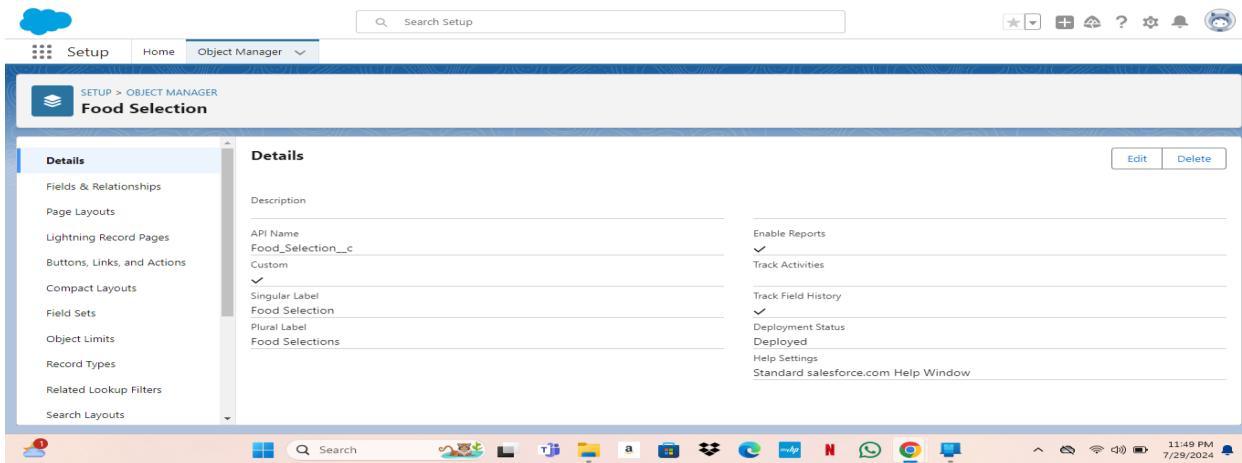
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save



Activity5 -Create a custom object for Food Selection

To create a custom object, follow these steps:

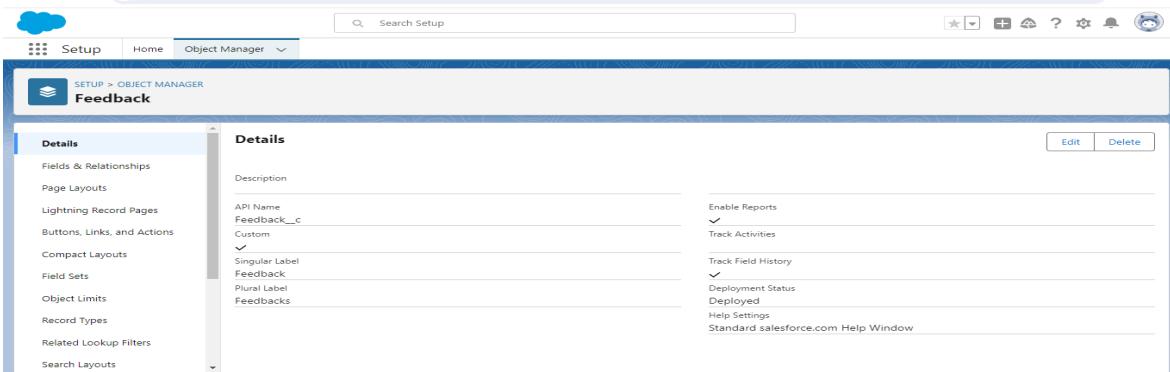
1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Food Selection".
4. Fill in the plural label as "Food Selections".
5. Record name: "Food Selection No"
6. Select the data type as "Auto number".
7. Under Display format enter FS No-(000)
8. Enter starting 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.



Activity6 - 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.



Milestone3- Tab

Introduction:

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

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

3. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Activity1- Creating a Tab for Total Rooms

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

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.

The screenshot shows the Salesforce Setup interface with the 'Tabs' section selected. The 'Custom Object Tabs' table lists the following tabs:

Action	Label	Tab Style	Description
Edit Del	Customers	Keys	
Edit Del	Feedbacks	Keys	
Edit Del	Food Selections	Keys	
Edit Del	Payments	Keys	
Edit Del	Room Bookings	Keys	
Edit Del	Total Rooms	Keys	

Milestone4- The Lightning App

Introduction:

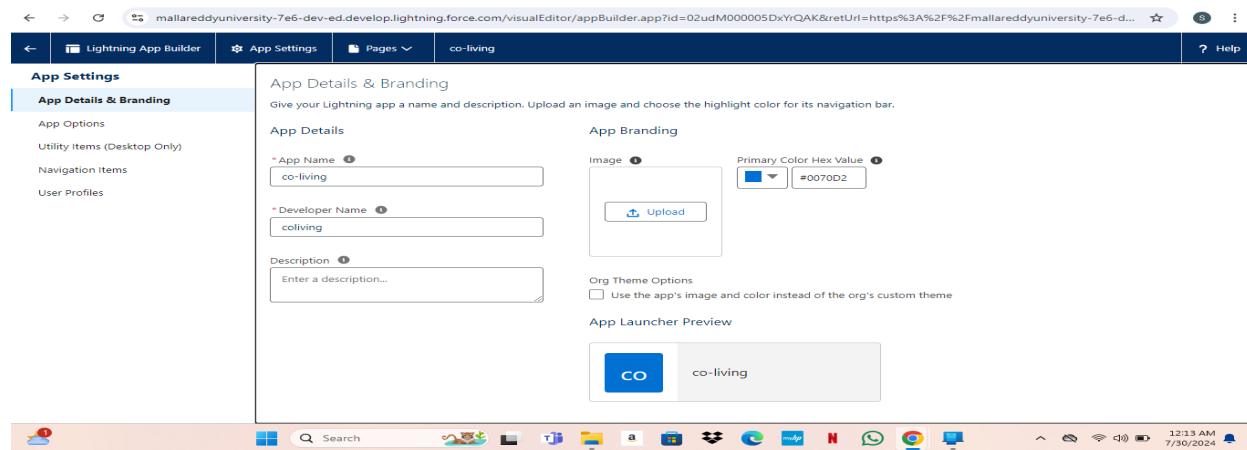
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org

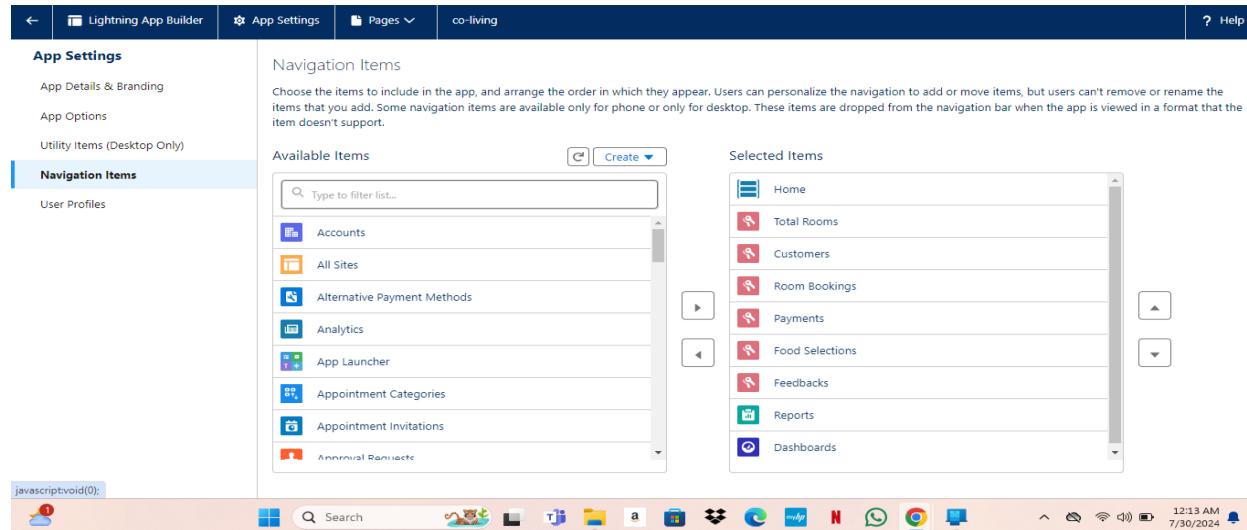
can work more efficiently by easily switching between apps.

Activity1 - Create a Lightning App

1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.

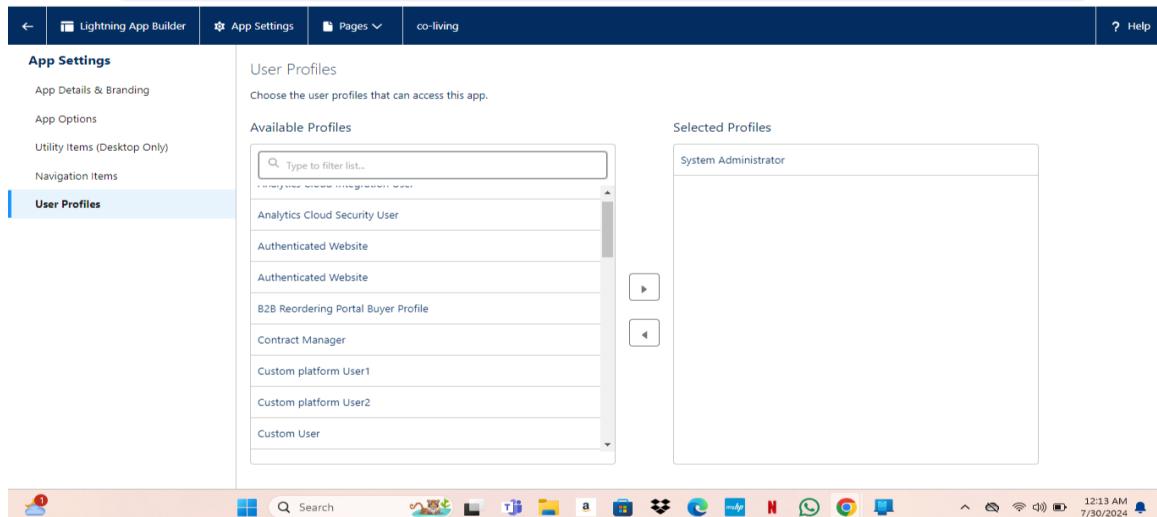


3. To Add Navigation Items: Ctrl and Select the items (Total Rooms, Customers1, Room Booking, Payments1, Food selection, Feedbacks, Reports and Dashboards) from the search bar and move it using the arrow button > Next.



4. To Add User Profiles:

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



Milestone 5 - Fields & Relationships

Introduction:

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

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

Custom Fields:

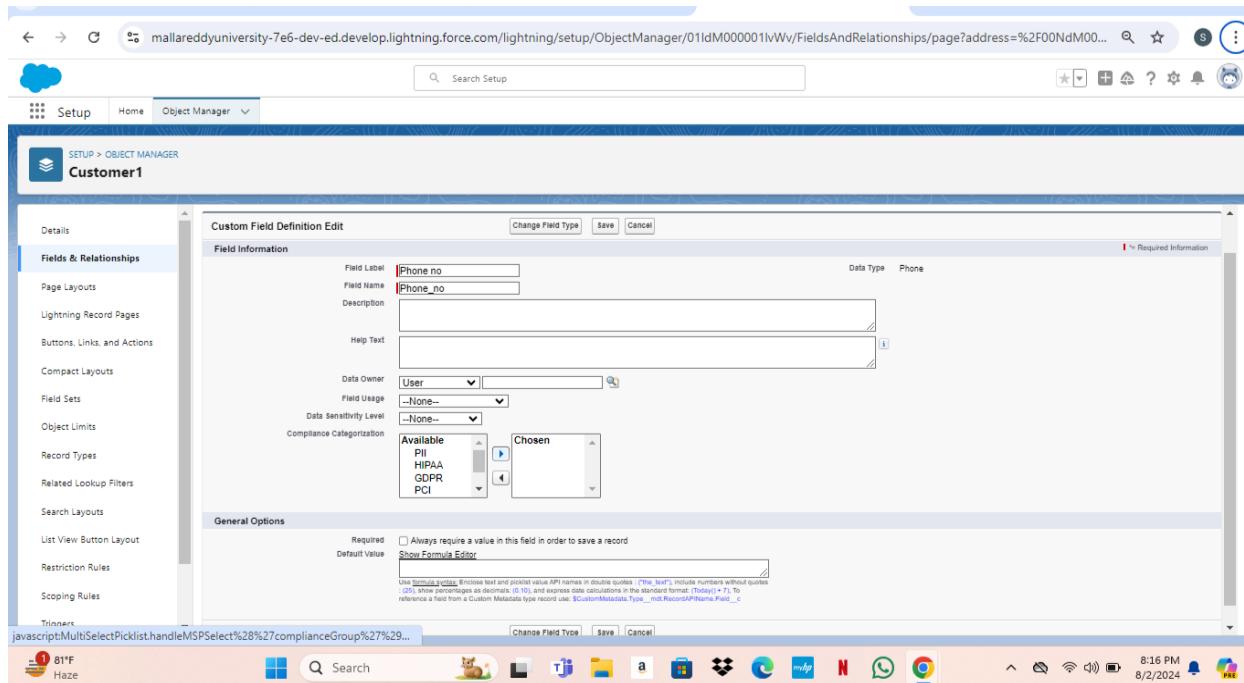
On the other side of the coin, Custom Fields are highly flexible, and users can change

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

Activity1- Creation of fields for the customer1 object

➤ To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Phone”
4. Click on next
5. Fill the Above as following:
 - Field Label: Phone no
 - Field Name : gets auto generated
 - Click on Next > Next > Save and new.



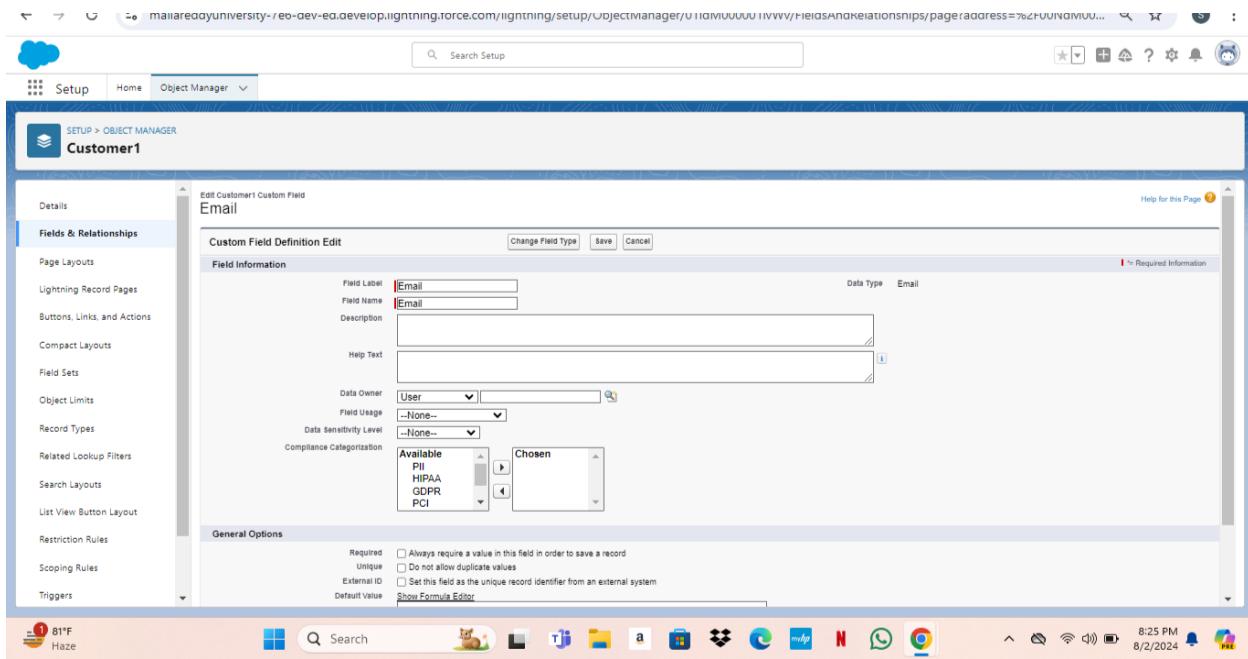
➤ me To create another fields in an object:

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

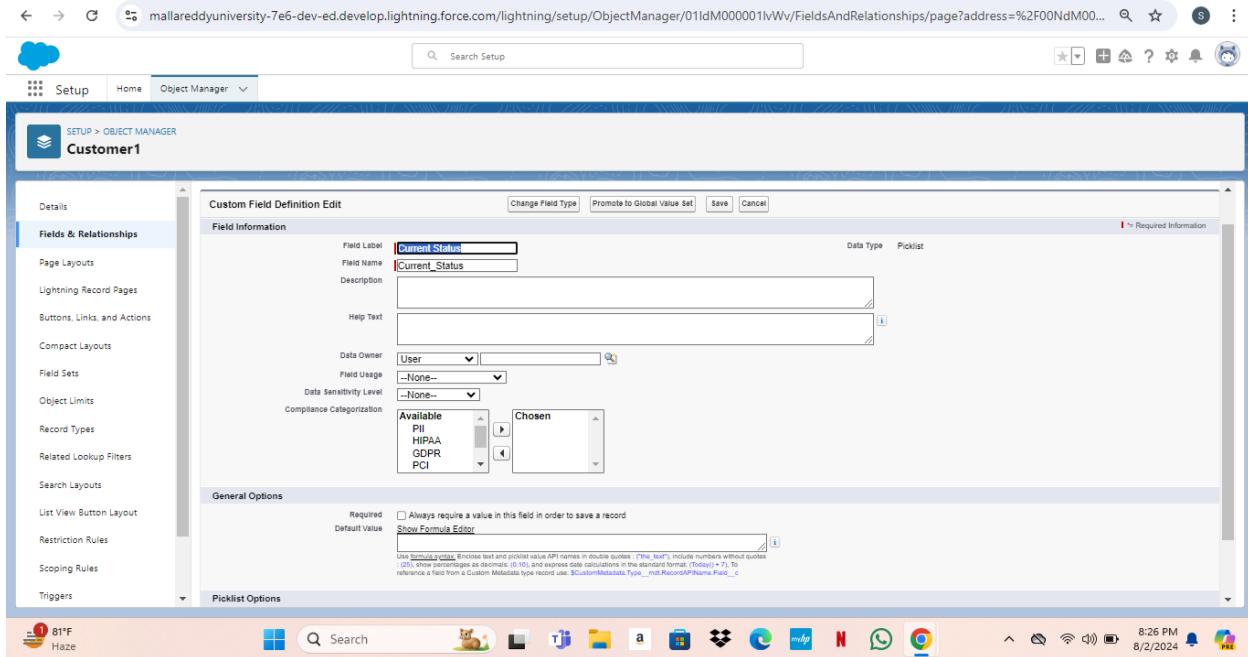
4. Fill the Above as following:

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



4. To create another fields in an object:

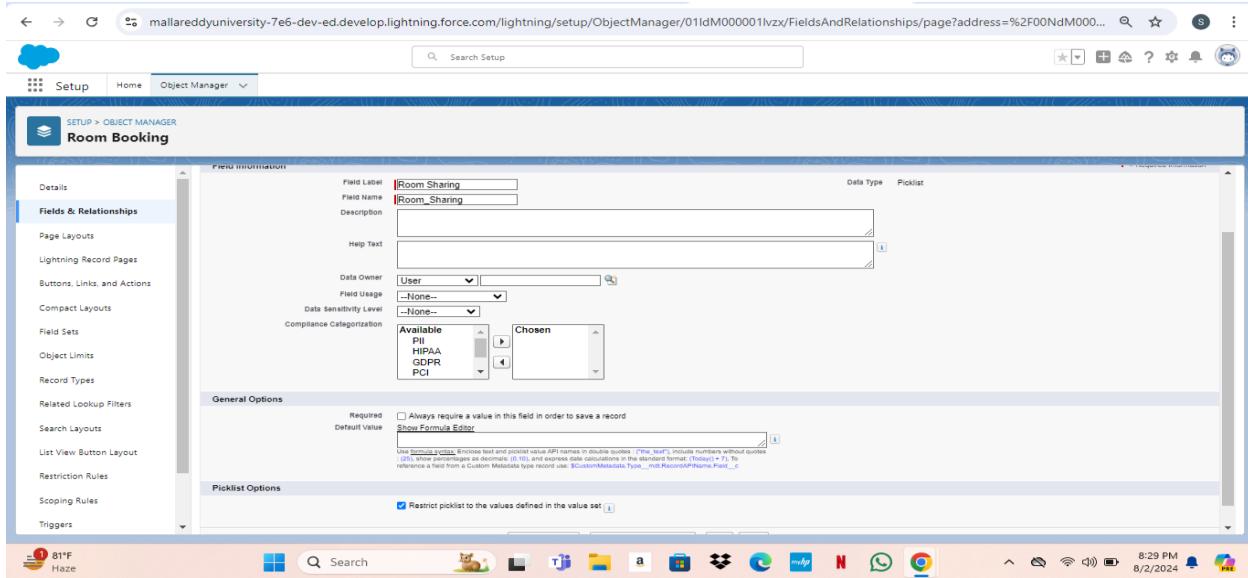
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:
 - Field Label: Current Status
 - Value - Select enter values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



Activity 2- Creation of fields for the Room Booking object

1. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
 2. Now click on “Fields & Relationships” > New
 3. Select Data Type as a “Picklist”
 4. Click on Next
 5. Fill the Above as following:
 - Field Label: Room Sharing
 - Value - Select enter values with each value separated by a new line
1. Single sharing
 2. Double sharing
 3. Triple sharing
 - Select required
 - Click on Next > Next > Save and new.



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

To create fields & relationship to an object:

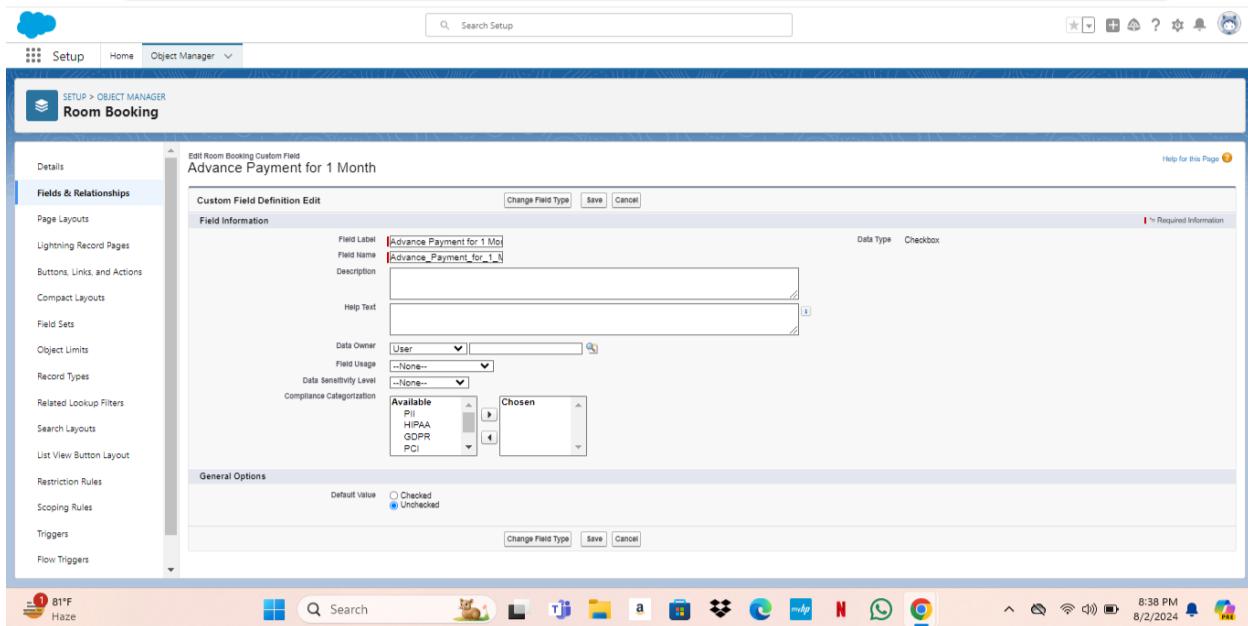
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Customer1” object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

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:

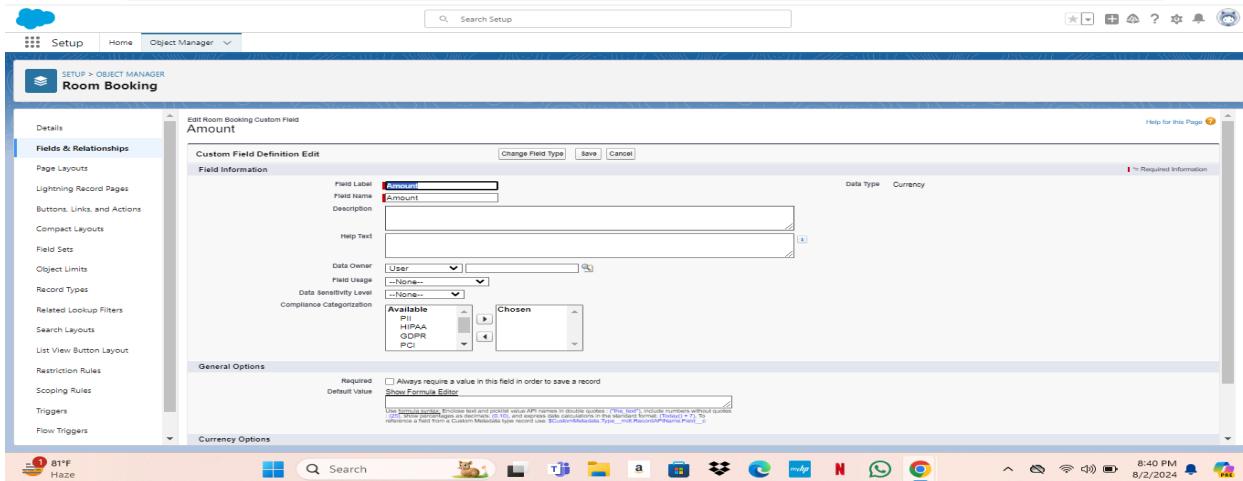
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Advance Payment for 1 Month
 - Field Name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



5. To create fields in an object:

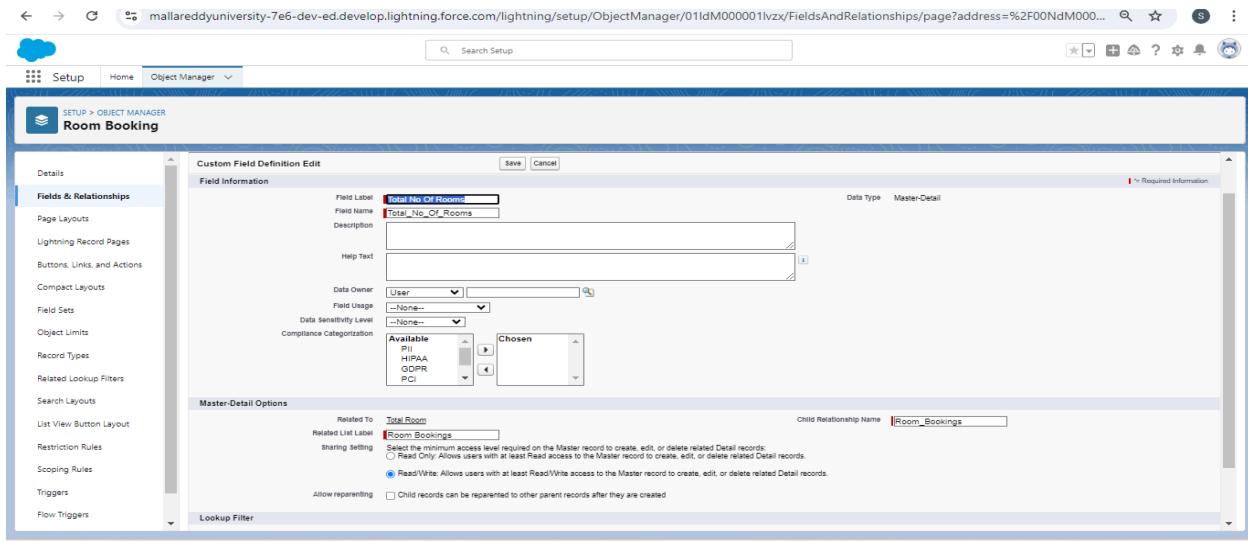
1. Go to setup ? click on Object Manager ? type object name(Room Booking) in the search bar ? click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Currency”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Amount
 - Length: (18,0)

- 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
- Click on Next > Next > Save and new.
7. Click on Next > Next > Save and new

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.

The image consists of two screenshots of the Salesforce Setup interface, specifically the Object Manager for the Room Booking object.

Screenshot 1: Custom Field Definition Edit - Fields & Relationships

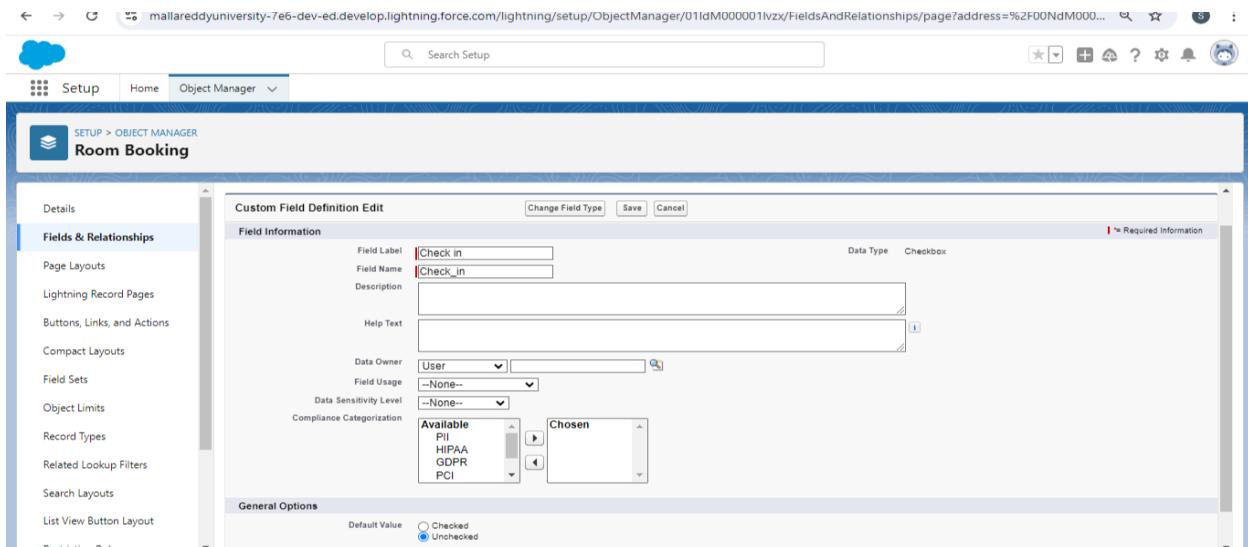
This screenshot shows the "Edit Room Booking Custom Field" page. The custom field being created is named "Rooms Available". The "Field Label" is "Rooms Available" and the "Field Name" is "Rooms_Available". The "Data Owner" is set to "User". Under "Data Sensitivity Level", "PII" is selected. In the "Available" section, "PCI" is listed. The "Chosen" section is empty. The "Help Text" and "Description" fields are empty.

Screenshot 2: Advanced Formula Editor - Fields & Relationships

This screenshot shows the "Advanced Formula" editor. The formula being defined is "Rooms Available (Number) = 30 - Total_No_of_Rooms__r.Rooms_Booked__c". The "Insert Operator" dropdown is set to "-". A sidebar titled "Functions" lists various mathematical and string functions like ABS, ACOS, ADDMONTHS, etc., with "ABS" currently selected. A "Check Syntax" button is visible at the bottom of the formula input area.

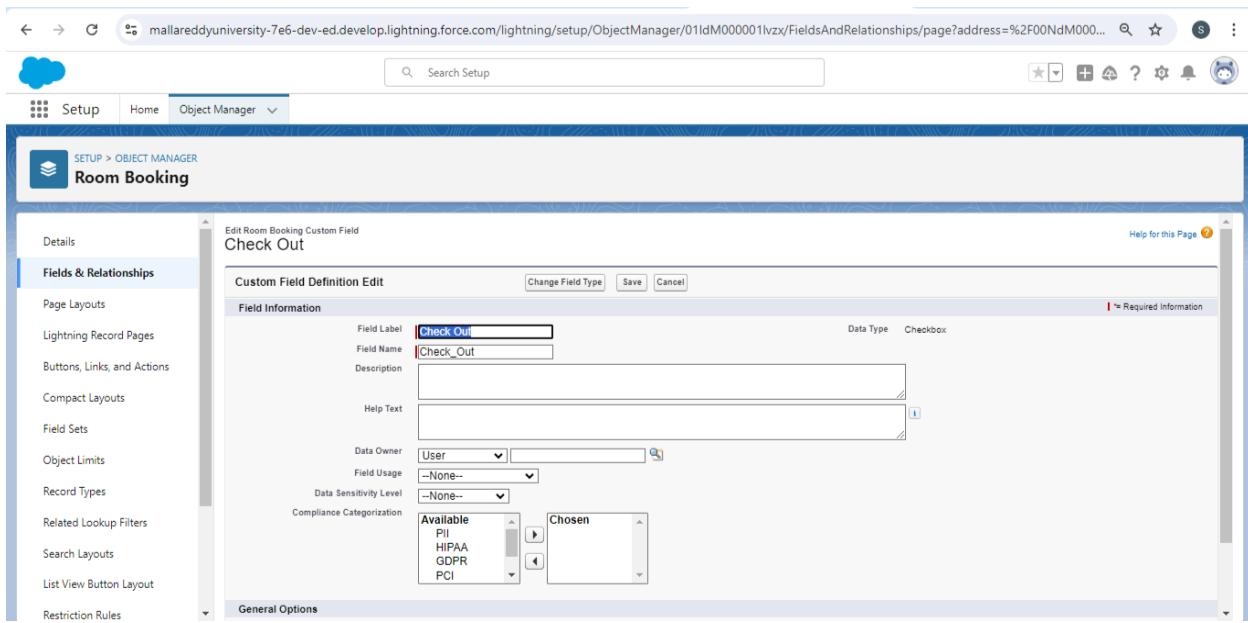
To create fields in an object:

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:

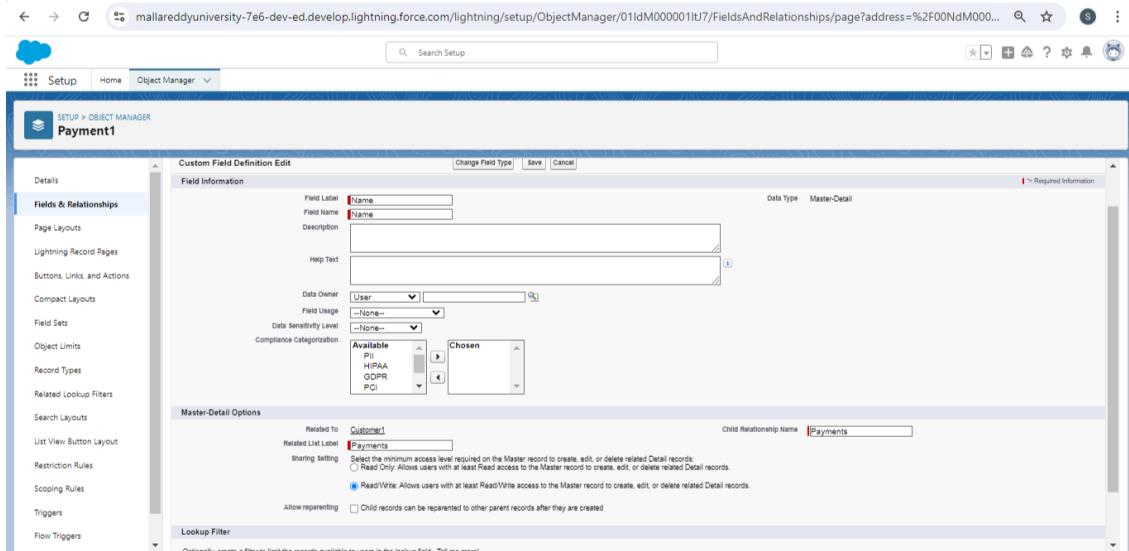
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Check Out
 - Field Name :It's gets auto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



Activity 3 - Creation of Fields & Relationship for Payment1 Object

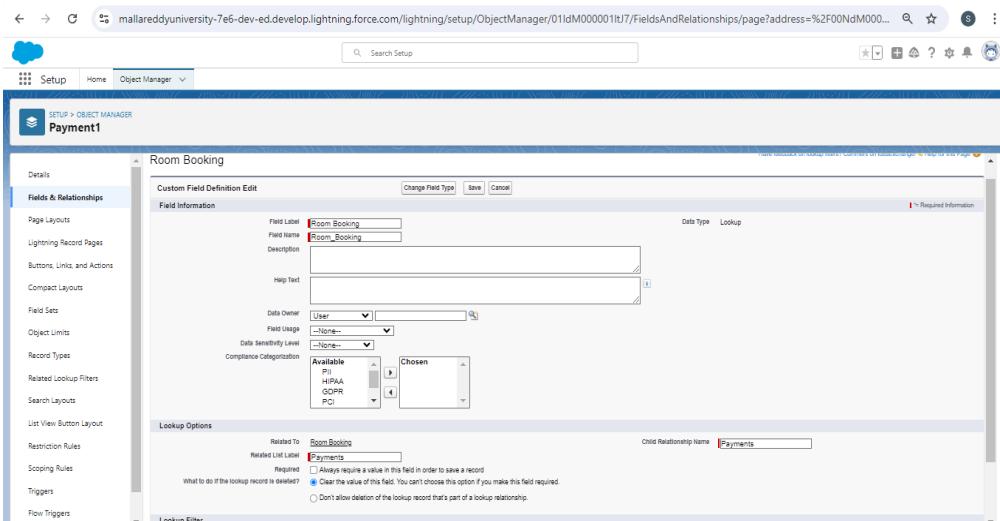
1. To create fields & relationship to an object:

1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Customer1 object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.



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

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



. Creation of another fields for the Payment1 object

To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Payment Mode
 - Value - Select enter values with each value separated by a new line
1. Cash
2. Check
3. Credit card
4. Debit card
5. UPI
6. Phonepe
7. Gpay
8. Paytm
 - Select required
 - Click on Next > Next > Save and new.

The screenshot shows the 'Custom Field Definition Edit' page for the 'Payment1' object. The 'Fields & Relationships' tab is selected in the sidebar. The main form is titled 'Field Information' and contains the following details:

- Field Label:** Payment Mode
- Field Name:** Payment_Mode
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** User
- Field Usage:** None
- Data Sensitivity Level:** None
- Compliance Categorization:** Available: PI, HIPAA, GDPR, PCI; Chosen: (empty)

Below this, under 'General Options', there is a checkbox for 'Always require a value in this field in order to save a record'. At the bottom, under 'Picklist Options', there is a checkbox for 'Restrict picklist to the values defined in the value set'.

Cross Object Formula Field:

In Salesforce, a cross-object formula field allows you to create a formula that references

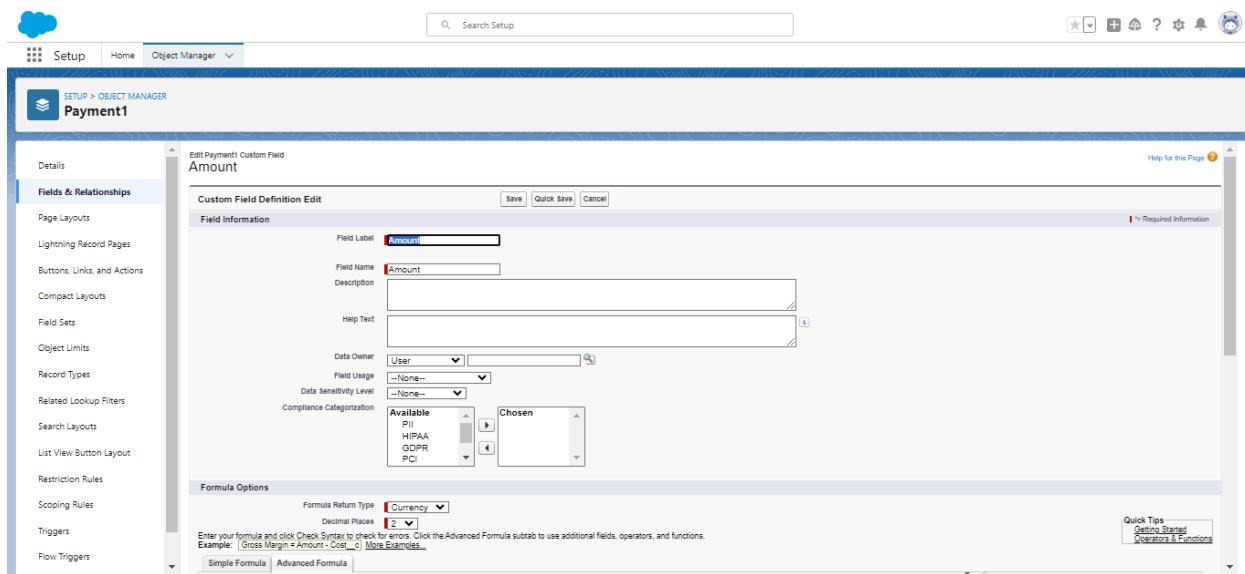
fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

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

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

4. Create a Cross object formula Field in Payment1 Object

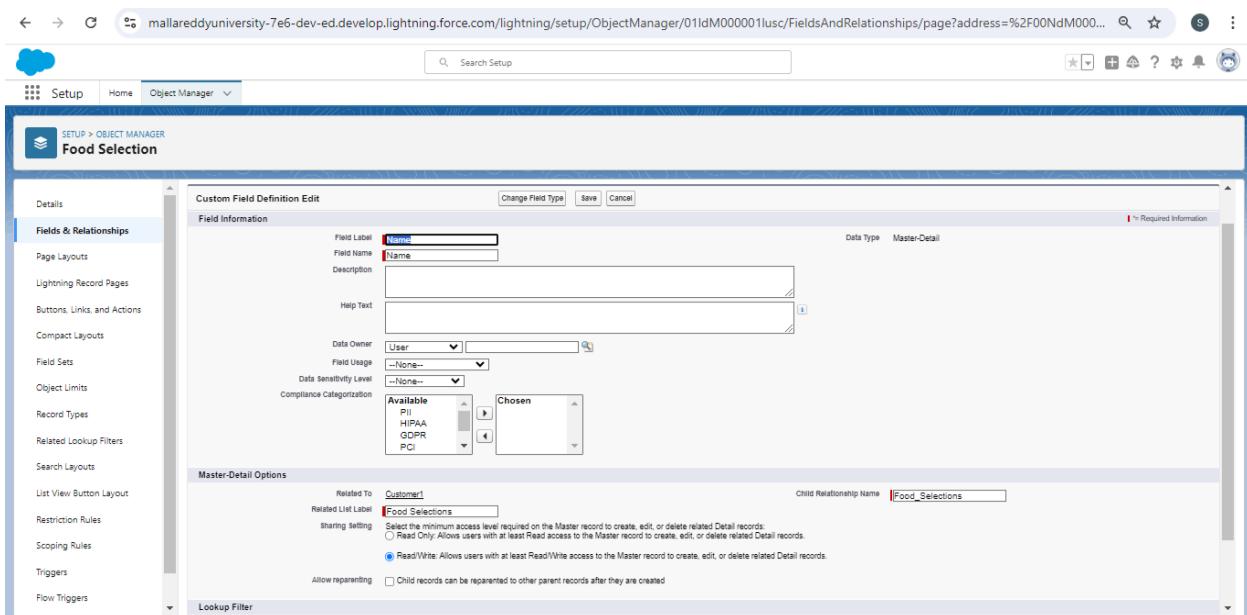
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Formula”
4. Click on Next
5. Enter the Field label: Amount and Field name: gets auto generated and click on Next
6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “Room_Booking__r.Amount__c ”.
7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.



Activity 4 - Creation of fields for the Food Selection object

1. To create fields & relationship to an object:

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



Picklist value sets:

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

Create a picklist value set:

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

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

The screenshot shows the Salesforce Setup interface for creating a new Picklist Value Set. The page title is "Picklist Value Sets".
Information section:

- Label: Custom Picklist values
- Name: Custom_Picklist_values
- Description: (empty)

Picklist Values Used:

- Active and inactive picklist values: 7 (1,000 max)
- Buttons: Edit, Delete

Values table:

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Deactivate	Sunday	Sunday	<input checked="" type="checkbox"/>	Assigned dynamically	Dikshitha Reddy, 29/07/2024, 1:42 pm
Edit Deactivate	Monday	Monday	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy, 29/07/2024, 1:42 pm
Edit Deactivate	Tuesday	Tuesday	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy, 29/07/2024, 1:42 pm
Edit Deactivate	Wednesday	Wednesday	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy, 29/07/2024, 1:42 pm
Edit Deactivate	Thursday	Thursday	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy, 29/07/2024, 1:42 pm
Edit Deactivate	Friday	Friday	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy, 29/07/2024, 1:42 pm
Edit Deactivate	Saturday	Saturday	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy, 29/07/2024, 1:42 pm

Inactive Values:

No Inactive Values values defined.

Fields Where Used:

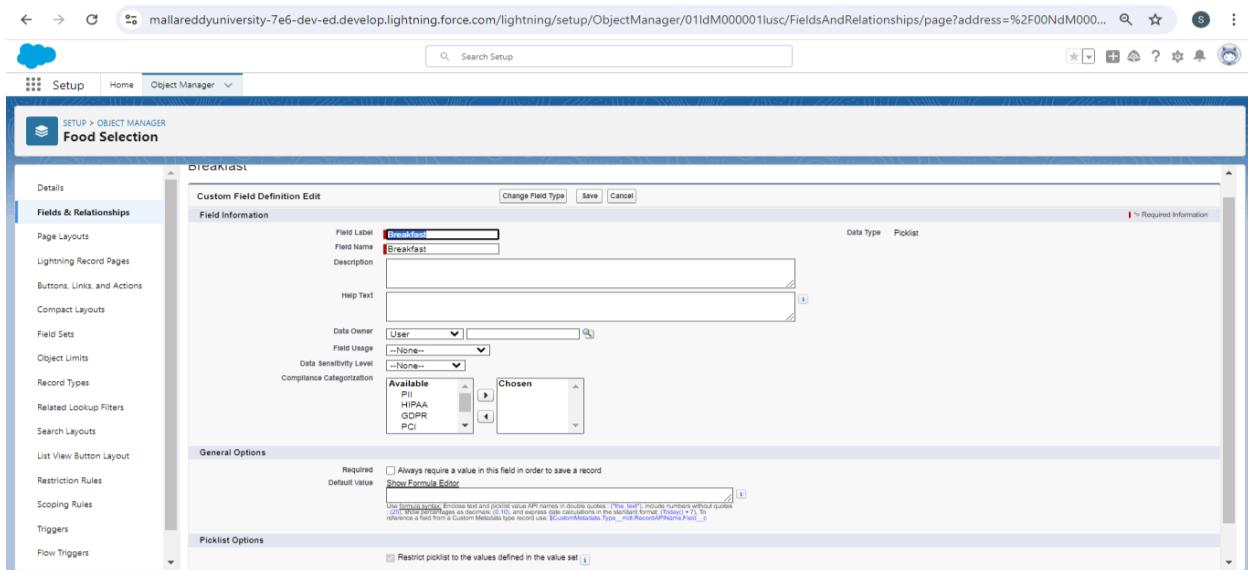
Field Label	Object	Data Type	Controlling Field
Breakfast	Food Selection	Picklist	
Dinner	Food Selection	Picklist	

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.

2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Breakfast
 - Under Value - Select the Use global picklist value set
 - Under the drop down select the Custom Picklist Values
 - Select required
 - Click on Next > Next > Save and new.



3. Create a another picklist Field for Food selection object

To create fields in an object :

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
1. Now click on “Fields & Relationships” > New
2. Select Data Type as a “Picklist”
 - a.

Fill the Above as following:

 - Field Label: Select Breakfast
 - Under Value - Enter values, with each value separated by a new line
 - a. Idli
 - b. Bonda
 - c. Dosa

- d. Upma
 - e. Vada
 - f. Puri
 - g. Chapati
- Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

Action	Value	API Name	Default	Modified By
<input type="checkbox"/>	Idli	Idli	<input checked="" type="checkbox"/>	Dishitha Reddy 20/07/2024, 1:47 pm
<input type="checkbox"/>	Bonda	Bonda	<input type="checkbox"/>	Dishitha Reddy 20/07/2024, 1:47 pm
<input type="checkbox"/>	Dosa	Dosa	<input type="checkbox"/>	Dishitha Reddy 20/07/2024, 1:47 pm
<input type="checkbox"/>	Upma	Upma	<input type="checkbox"/>	Dishitha Reddy 20/07/2024, 1:47 pm
<input type="checkbox"/>	Vada	Vada	<input type="checkbox"/>	Dishitha Reddy 20/07/2024, 1:47 pm
<input type="checkbox"/>	Puri	Puri	<input type="checkbox"/>	Dishitha Reddy 20/07/2024, 1:47 pm
<input type="checkbox"/>	Chapati	Chapati	<input type="checkbox"/>	Dishitha Reddy 20/07/2024, 1:47 pm

Field Dependency:

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

Need to use Field Dependency:

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

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

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies

3. Now Click on New Option
4. Under Controlling Field: Breakfast, Dependent Field: Select Breakfast and Click on Continue
5. Under the Sunday Ctrl and select the Picklist values Idli,Dosa,Puri and Click on Include Values in such a way that do for the remaining days and click on save

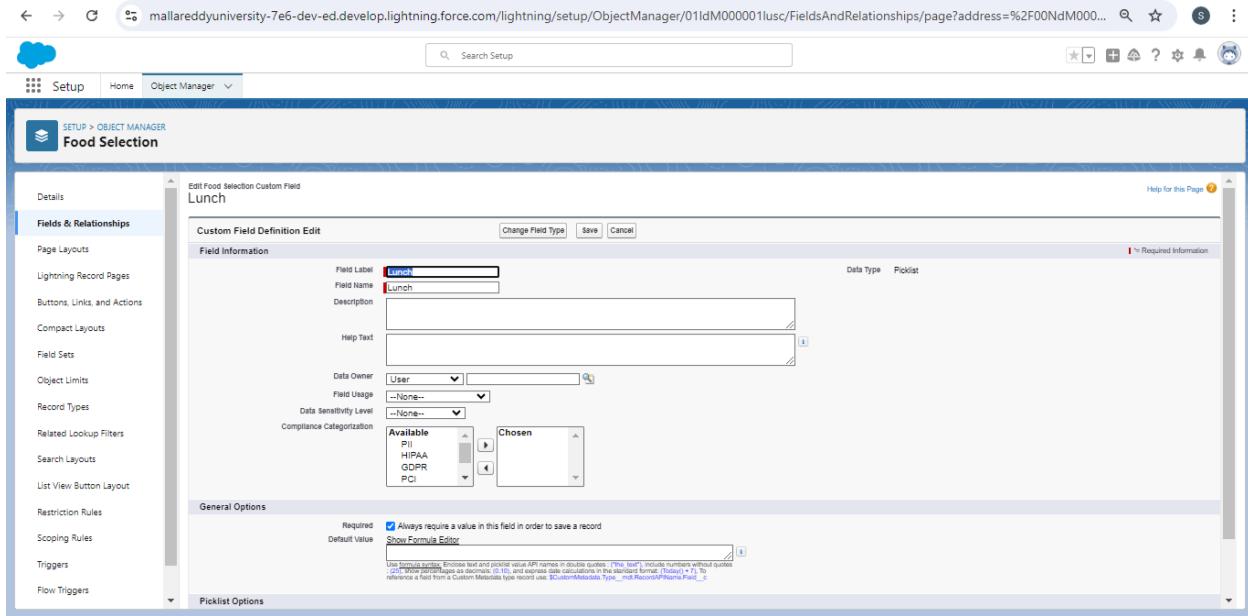
The screenshot shows the Salesforce Setup interface with the following details:

- Left Sidebar:** Shows sections for Data (Picklist Settings, State and Country/Territory, Picklists), Objects and Fields (Picklist Value Sets).
- Top Bar:** Includes a search bar labeled "Search Setup" and various navigation icons.
- Central Area:**
 - Header:** "SETUP" with "Save", "Cancel", and "Preview" buttons.
 - Controlling Field:** Set to "Breakfast".
 - Dependent Field:** Set to "Select Breakfast".
 - Instructions:** Includes a legend for "Included Value" (yellow background) and "Excluded Value" (white background). It also provides instructions for using the grid:
 - Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
 - To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
 - Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
 - Use the Preview button to test the results.
 - Grid View:** A 7x7 grid where each row represents a day of the week (Sunday through Saturday) and each column represents a breakfast item. The grid shows the following data:

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Select Breakfast:							
Bonda	Bonda	Bonda	Bonda	Bonda	Bonda	Bonda	Bonda
Dosa	Dosa	Dosa	Dosa	Dosa	Dosa	Dosa	Dosa
Upma	Upma	Upma	Upma	Upma	Upma	Upma	Upma
Vada	Vada	Vada	Vada	Vada	Vada	Vada	Vada
Puri	Puri	Puri	Puri	Puri	Puri	Puri	Puri
Chapati	Chapati	Chapati	Chapati	Chapati	Chapati	Chapati	Chapati
 - Buttons:** "Save", "Cancel", "Preview".
 - Legend:** Shows "Included Value" (yellow) and "Excluded Value" (white).
 - Page Footer:** "Showing Columns: 1 - 5 (of 7) < Previous | Next > | View All".

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.

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Meals	Meals	<input checked="" type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Chicken biryani	Chicken biryani	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Veg biryani	Veg biryani	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Veg fried rice	Veg fried rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Egg fried rice	Egg fried rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Chicken fried rice	Chicken fried rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Curd rice	Curd rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Tomato rice	Tomato rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Egg noodles	Egg noodles	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Chicken Noodles	Chicken Noodles	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm
<input type="checkbox"/> Edit Del Deactivate	Bhagara rice	Bhagara rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 20/07/2024, 1:55 pm

To create a Field dependencies for Lunch and Select Lunch.

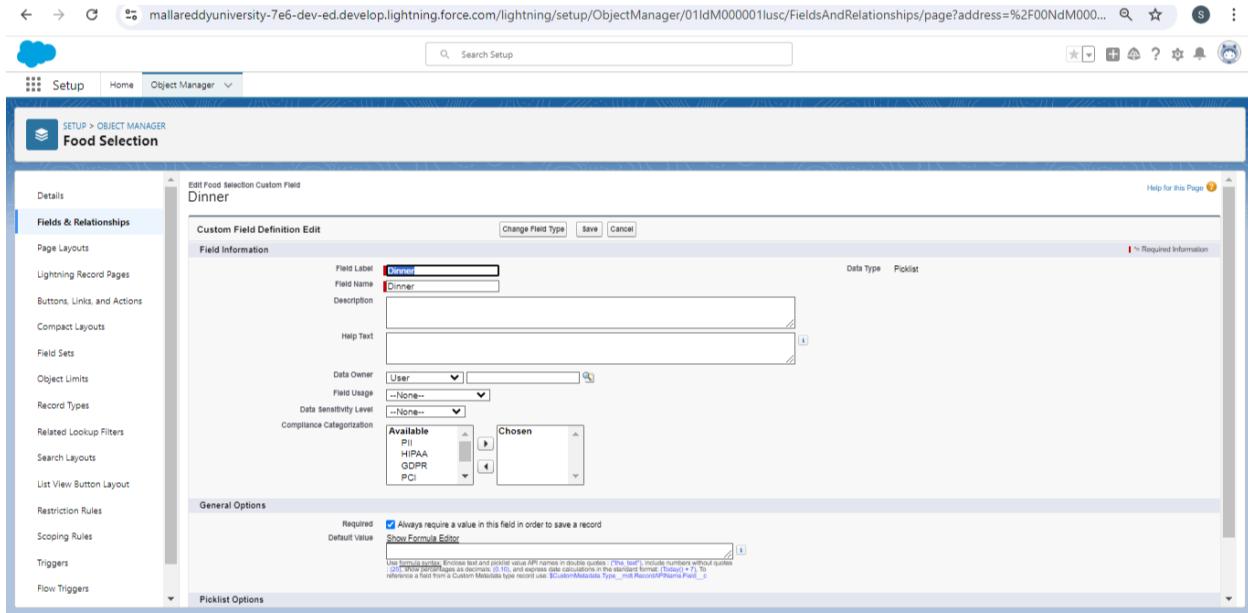
1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field:Lunch, Dependent Field: Select Lunch and Click on Continue
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 Salesforce Setup page with the search bar set to 'pick'. The main area displays a picklist configuration for 'Lunch'. The legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'. The picklist grid shows various meal options across days of the week.

Lunch:	Sunday	Monday	Tuesday	Wednesday	Thursday
Select Lunch:	Meals	Meals	Meals	Meals	Meals
	Chicken biryani				
	Veg biryani				
	Veg fried rice				
	Egg fried rice				
	Chicken fried rice				
	Curd rice				
	Tomato rice				
	Egg noodles				
	Chicken Noodles				
	Bhagara rice				

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.

Action	Value#	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/> Edit Del Deactivate	Meals	Meals	<input checked="" type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Chicken biryani	Chicken biryani	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Veg biryani	Veg biryani	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Veg fried rice	Veg fried rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Egg fried rice	Egg fried rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Chicken fried rice	Chicken fried rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Curd rice	Curd rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Tomato rice	Tomato rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Egg noodles	Egg noodles	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Chicken Noodles	Chicken Noodles	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm
<input type="checkbox"/> Edit Del Deactivate	Bhagara rice	Bhagara rice	<input type="checkbox"/>	Assigned dynamically	Dikshitha Reddy 29/07/2024, 2:01 pm

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 create fields & relationship to an object:

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

2. To create Another fields in an Same object:

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

2. Satisfaction
3. Bad
 - Click on Next > Next > Save and new.

3. To create a Another Fields in an Same Object

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

4. To create a Another Fields in an Same Object

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

5. To create a Another Fields in an Same Object

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Text area”
4. Click on Next
5. Fill the Above as following:

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

Activity 6 -Creation of fields for the Total Rooms object

1. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Total Rooms) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
5. Field Label: Rooms Available
6. Field Name : It's gets auto generated
7. Select the Formula Return Type as “Number”
8. Select the Decimal places as “0” and Click on Next

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

9. Click on the Advanced Formula “ 30 - Rooms_Booked__c ” and Check Syntax
- 10.Click on Next > Next > Save and new.

The screenshots show the configuration of a custom field named 'Rooms Available' for the 'Total Room' object in Salesforce. The top screenshot displays the 'Custom Field Definition Edit' page with various settings like Field Label, Field Name, Data Owner, and Compliance Categorization. The bottom screenshot shows the 'Advanced Formula' tab where a formula is being constructed: '30 - Rooms_Booked'. A function palette is visible on the right side.

Milestone 6 - Validation rule

Introduction:

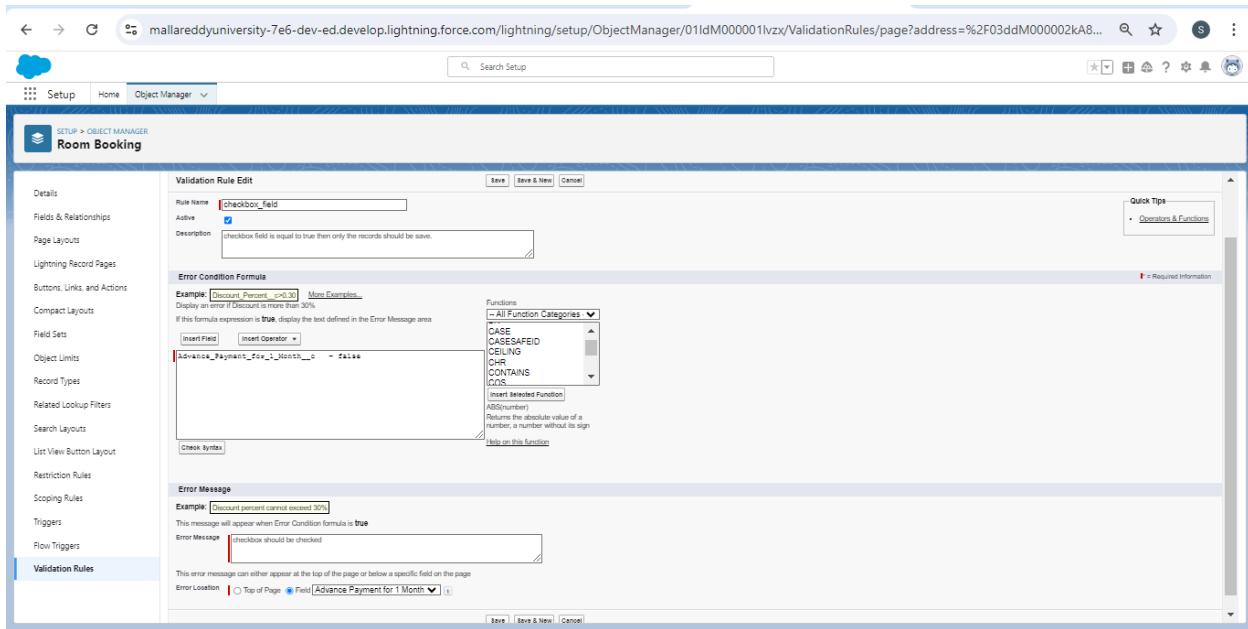
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Activity 1 -Create a validation rule to an Room Booking Object

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

search bar > click on the object.

2. Now click on “Validation rule” at top > New.
3. Enter Rule name “checkbox field” and make the validation should be Active.
4. Enter the formula in the formula Box “Advance_payment_for_1month_c = false” and check for syntax error.
5. Enter the error message “Checkbox should be checked”
6. Select error location as field(Advance payment for 1month)
7. Click on save.

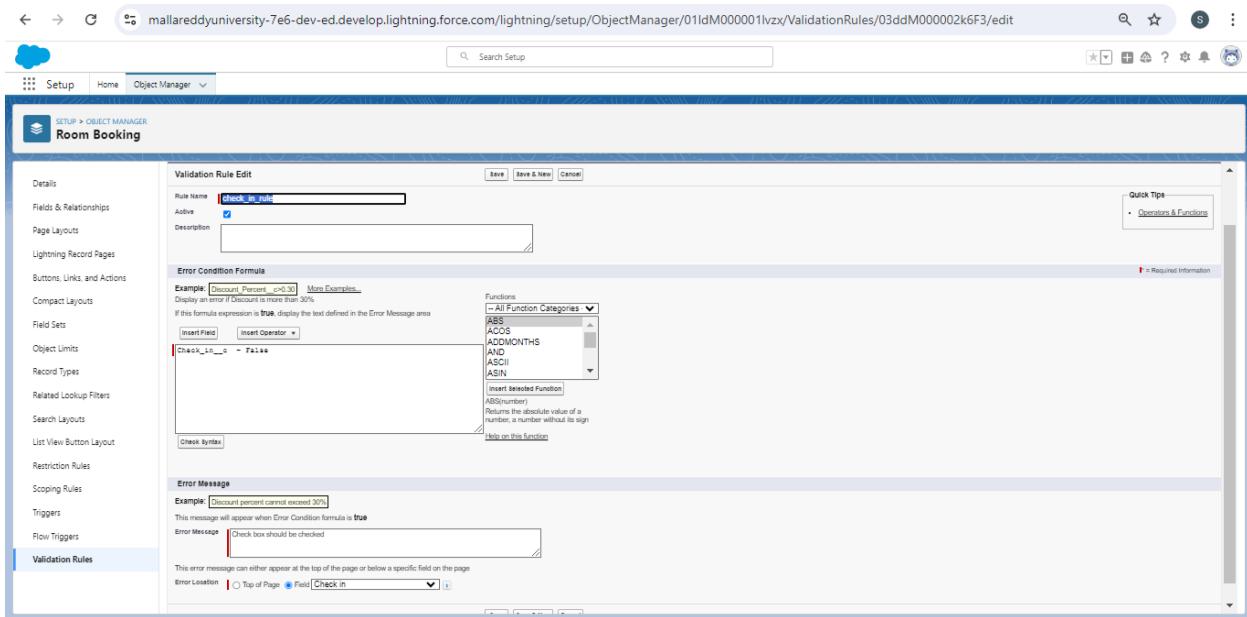


Activity 2- Create a Another validation rule to an Room

Booking Object

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

7. Click on save.



Milestone 7 -Profile

Introduction:

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

Activity 1- Custom user Profile

To create a new profile:

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

5. Scroll down and Click on Save.

The image contains two screenshots of the Salesforce Setup Profiles interface.

Screenshot 1: Profile Edit - Custom User

- Profile Edit:** Shows the 'Custom User' profile being edited. Fields include Name (Custom User), User License (Salesforce), and Description (empty).
- Custom App Settings:** A grid of application settings. Most checkboxes are checked (Visible and Default). Examples include All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, co-hiring, Community, Content, Data Manager, Digital Experiences, Lightning App, Marketing CRM Classic, Queue Management, Sales, Sales Console, Salesforce Chatter, Salesforce Setup, Sample Console, Service, Service Console, Site.com, Subscription Management, and Work.

Screenshot 2: Profiles List

- Profiles List:** Shows a list of profiles:
 - Locations
 - Location Groups
 - Marsos
 - Work Step Templates
 - Work Types
 - Work Type Groups
- Custom Object Permissions:** Grid showing permissions for Customers, Feedbacks, Food feedbacks, Payments, Room Bookings, and Total Rooms across basic and delete actions.
- Session Settings:** Session Times Out After: 2 hours of inactivity.
- Password Policies:** Set to expire in 90 days, enforce password history (3 passwords remembered), minimum password length (8), complex requirement (Must include alpha and numeric characters), password question requirement (Cannot contain password), maximum invalid login attempts (10), and logout effective period (15 minutes).

Activity 2 - Custom platform user1

To create a new profile:

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

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

The screenshot shows the Salesforce Setup interface under the Profiles section. It displays a grid of object permissions for different user profiles. The objects listed include Contacts, Push Topics, Payments, and others. Under each object, there are five columns: Read, Create, Edit, Delete, and Data Administration. The 'Read' column is checked for most objects, while 'Create', 'Edit', 'Delete', and 'Data Administration' are mostly unchecked. Below this grid, there are sections for Session Settings (Session Times Out After: 2 hours of inactivity) and Password Policies (User passwords expire in: 90 days, etc.). At the bottom, there are buttons for Save, Save & New, and Cancel.

Activity 3- Custom platform user2

To create a new profile:

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

The screenshot shows the Salesforce Setup interface under the Profiles section. It displays a grid of permissions for different objects. In the 'Custom Object Permissions' section, there are tables for Customers, Feedbacks, Food Selections, Payments, Room Bookings, and Total Rooms, each with columns for Read, Create, Edit, Delete, View All, and Modify All. Below these are sections for Session Settings (Session Times Out After: 2 hours of inactivity) and Password Policies (User passwords expire in: 90 days, etc.).

Milestone 8 - Roles

Introduction:

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

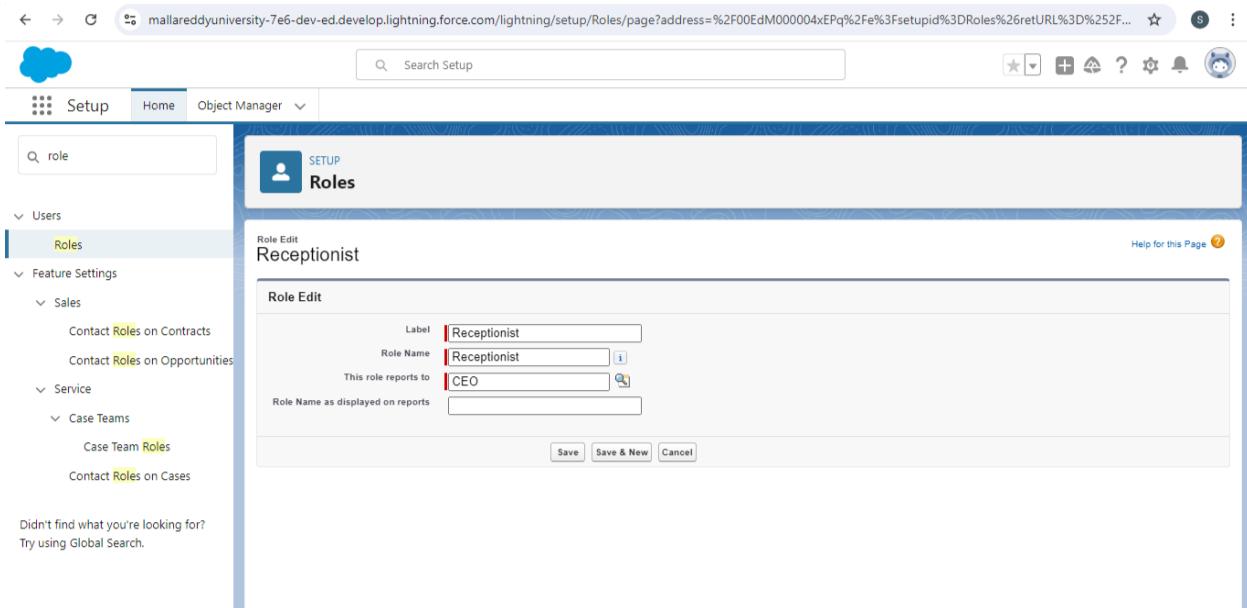
Activity 1 - Marketing Role

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

The screenshot shows the Salesforce Setup interface under the Roles section. It displays a 'Role Edit' screen for a role named 'Marketing'. The 'Label' field contains 'Marketing', the 'Role Name' field also contains 'Marketing', and the 'This role reports to' field is set to 'CEO'. There are buttons for Save, Save & New, and Cancel.

Activity 2 -Receptionist Role

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



Milestone 9 - Users

Introduction:

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

Activity 1- Create User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : sandeep
 - Last Name : gujja

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

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 a prominent 'Users' category which is currently active. The main content area displays a 'User Edit' screen for a user named 'sandeep gujja'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right of these fields, there's a 'Marketing User' checkbox followed by a long list of other user types (Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User) each with its own checkbox. The 'Role' field is set to 'CEO', 'User License' to 'Salesforce', and 'Profile' to 'Custom User'. The 'Active' checkbox is checked. At the bottom of the edit screen, there are 'Save', 'Save & New', and 'Cancel' buttons.

Activity 2 - Create Another User

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

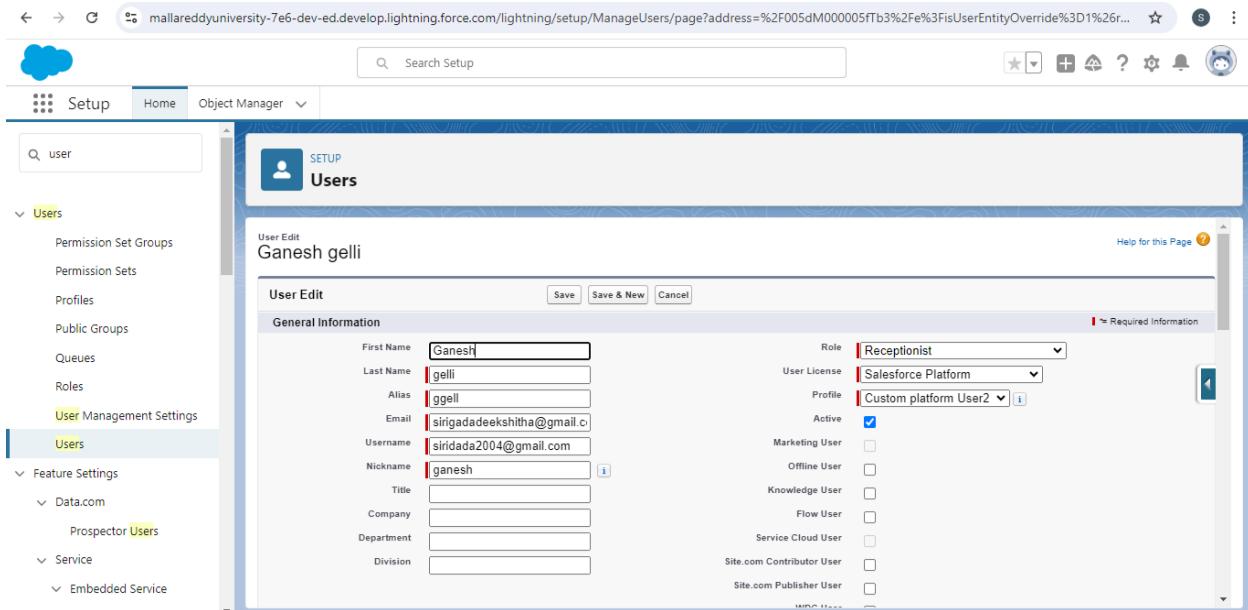
- Profiles : Custom Platform User1

3. save

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, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a highlighted 'Users' category. The main area displays the 'User Edit' screen for a user named 'Abhilash garapati'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right of these fields are dropdown menus for Role, User License, Profile, and Active status. A legend indicates that red boxes highlight required information.

Activity 3 - Create Another User

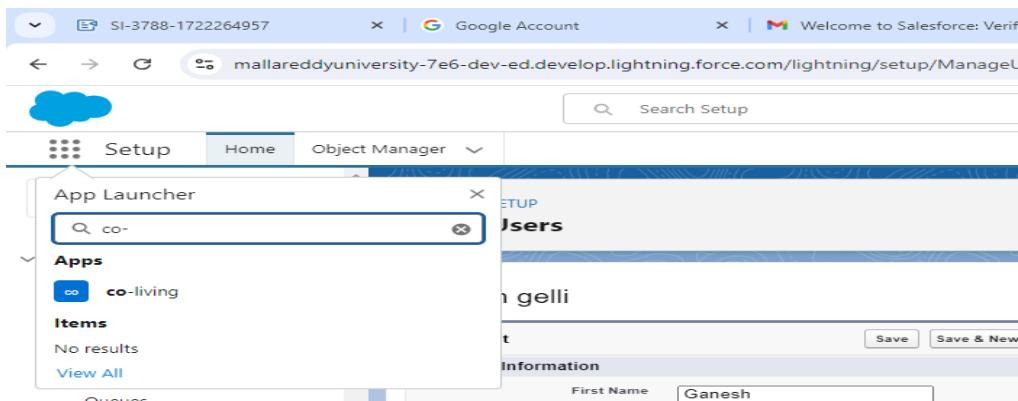
1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Ganesh
 - Last Name : gelli
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name: Give a Nickname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



Milestone10 - 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.
4. Click new and fill details & Save

New Customer1

* = Required Information

Information

*Customer Name: sandeep

Phone no: 8688956652

Email: sirigadadeekshitha@gmail.com

Permanent Address: Hyderabad

Owner: Dikshitha Reddy

Current Status: Employee

Save & New Save

Activity 2 -View a Record (Customers)

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

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

Search...

Customer1 sandeep

New Contact Edit New Opportunity

Details	
Customer Name	sandeep
Phone no	8688956652
Email	sirigadadeekshitha@gmail.com
Permanent Address	Hyderabad
Current Status	Employee
Created By	Dikshitha Reddy, 02/08/2024, 10:56 pm
Last Modified By	Dikshitha Reddy, 02/08/2024, 10:56 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 Salesforce Lightning page for a 'co-living' application. The top navigation bar includes links for 'Total Rooms', 'Customers', 'Room Bookings', 'Payments', 'Food Selections', 'Feedbacks', 'Reports', and 'Dashboards'. The main content area displays a list titled 'Recently Viewed' under the 'Customers' tab. The list contains 7 items, all of which have been updated a few seconds ago. The items are: 1. sandeep, 2. Ragu, 3. deepu, 4. pavani, 5. rajesh, 6. madhu, and 7. sandeep. The first item, 'sandeep', has a context menu open, with the 'Delete' option highlighted by a red box. Other options in the menu include 'Edit', 'Change Owner', and 'Edit Labels'.

Milestone11 - Reports

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

Types of Reports in Salesforce

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

Activity 1 - Create Report

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

REPORT ▾

New Report ▾ Customers with Room Bookings and Total Rooms

Fields

- Groups
 - GROUP ROWS
 - Add group...
 - Customer: Customer Name X
- GROUP COLUMNS
 - Add group...

Columns

- Total No Of Rooms: Total No Of R X
- Room Booking: Room No X
- Phone no X
- Email X
- Permanent Address X
- Current Status X
- Room Sharing X
- # Advance Payment for 1 Month X
- # AC-3000 X

Customer1: Customer Name ▾ Total No Of Rooms: Total No Of Rooms ▾ Room Booking: Room No ▾ Phone no ▾ Email ▾ Permanent Address ▾ Current Status ▾ Room Sharing ▾ Advance Payment for 1 Month

Previewing a limited number of records. Run the report to see everything.

Customer1: Customer Name	Total No Of Rooms: Total No Of Rooms	Room Booking: Room No	Phone no	Email	Permanent Address	Current Status	Room Sharing	Advance Payment for 1 Month
deepu	50	RN-004	9912765243	deepu@gmail.com	kammareddy	Employee	Double sharing	<input checked="" type="checkbox"/>
	50	RN-005	9912765243	deepu@gmail.com	kammareddy	Employee	Double sharing	<input checked="" type="checkbox"/>
Subtotal								2
pavani	50	RN-003	8767865645	pavani@gmail.com	hyderabad	Employee	Single sharing	<input checked="" type="checkbox"/>
Subtotal								1
Ragu	50	RN-002	8812546243	ragu23@gmail.com	hyderabad	Employee	Double sharing	<input checked="" type="checkbox"/>
Subtotal								1
sandeep	50	RN-001	9703402723	sandeep@gmail.com	hyderabad	Employee	Single sharing	<input checked="" type="checkbox"/>
Subtotal								1
Total								5

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

Conditional Formatting

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.

REPORT ▾

New Report ▾ Customers with Payments and Room Booking

Fields

- Groups
 - GROUP ROWS
 - Add group...
 - Customer: Customer Name X
- GROUP COLUMNS
 - Add group...

Columns

- Payment1: Payment No X
- Room Booking: Room No X
- Phone no X
- Email X
- Permanent Address X
- Current Status X
- Room Booking: Room Sharing X
- Room Booking: Advance Pay X
- # Room Booking: Advance Pa X
- # Room Booking: AC-3000 X
- # Amount X

Customer1: Customer Name ▾ Payment1: Payment No ▾ Room Booking: Room No ▾ Phone no ▾ Email ▾ Permanent Address ▾ Current Status ▾ Room Booking: Room Sharing ▾ Room Booking: Advance Pay

Previewing a limited number of records. Run the report to see everything.

Customer1: Customer Name	Payment1: Payment No	Room Booking: Room No	Phone no	Email	Permanent Address	Current Status	Room Booking: Room Sharing	Room Booking: Advance Pay
deepu	PNO-002	RN-003	9912765243	deepu@gmail.com	kammareddy	Employee	Single sharing	<input checked="" type="checkbox"/>
Subtotal								1
madhu	PNO-005	RN-003	8945367223	madhu@gmail.com	kamrule	Employee	Single sharing	<input checked="" type="checkbox"/>
Subtotal								1
pavani	PNO-004	RN-001	8767865645	pavani@gmail.com	hyderabad	Employee	Single sharing	<input checked="" type="checkbox"/>
Subtotal								1
Ragu	PNO-001	RN-004	8812546243	ragu23@gmail.com	hyderabad	Employee	Double sharing	<input checked="" type="checkbox"/>
Subtotal								1
rajesh	PNO-003	RN-002	975345673	rajesh@gmail.com	hyderabad	Employee	Double sharing	<input checked="" type="checkbox"/>
Subtotal								1
Total								4

Row Counts Detail Rows Subtotals Grand Total

Update Preview Automatically

Conditional Formatting

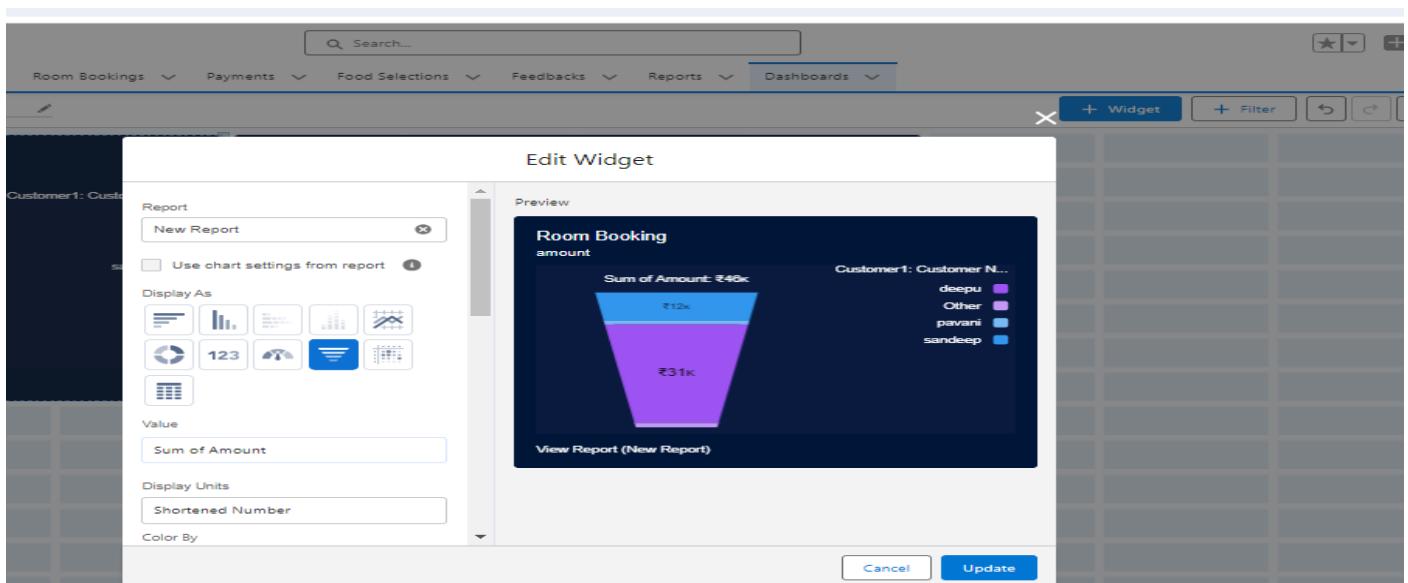
Milestone12 - Dashboards

Introduction:

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

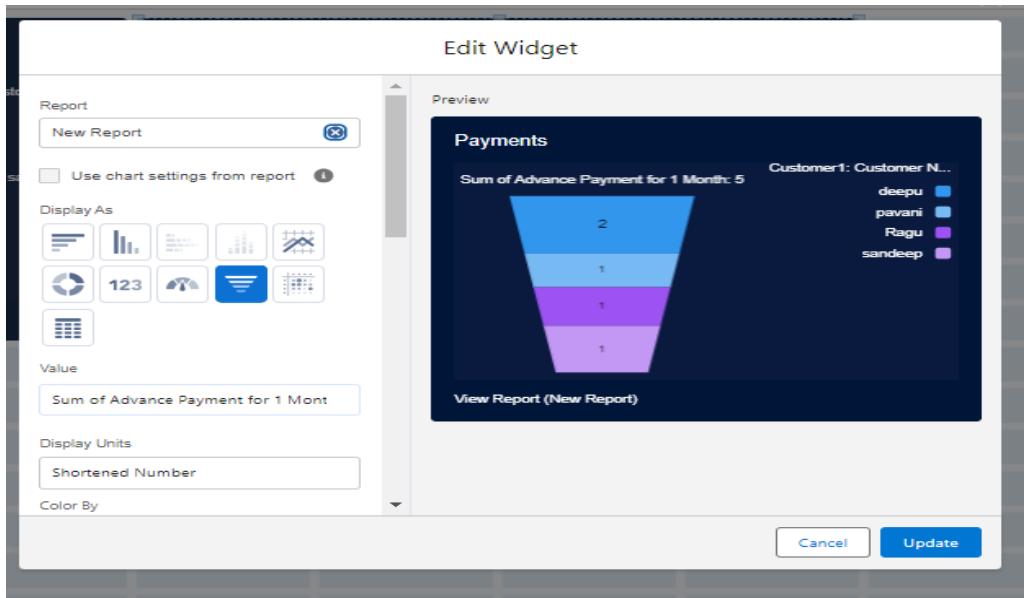
Activity 1- Create Dashboard

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.



Milestone 13 - Flows

Introduction:

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

Why do we need to create a flow:

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

Activity 1 - Create a Flow

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

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

- Click on “+” Symbol In the Outcome Order.

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

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

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

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

14. Click on “+” Symbol under the single sharing and Select the “update Records” in the drop down list.

15. Enter the update records details

- Label: Single.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 28000.
- Click on Done.

16. Enter the update records details

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

- Value: 24000.
- Click on Done.

17. Enter the update records details

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

18. Enter the update records details

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

19. Enter the update records details

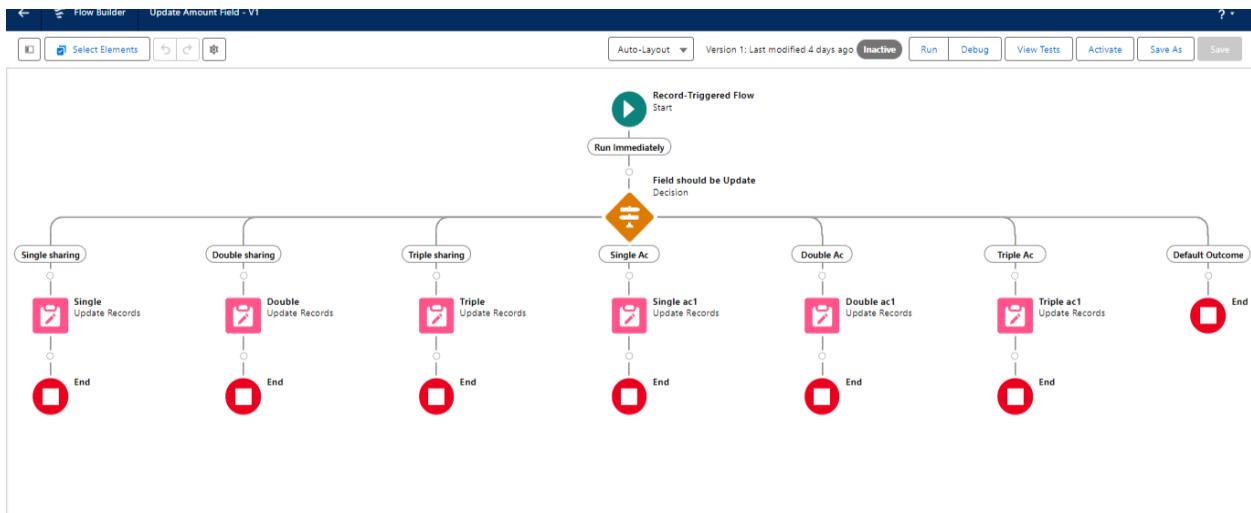
- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click on Done.

20. Enter the update records details

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

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

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



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