

A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING



Name : Majji Neelima

Gmail: neelumajji235@gmail.com

PROJECT ABSTRACT :

The 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...

INDEX

<u>Title Name</u>	<u>Page no</u>
A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING	1
PROJECT ABSTRACT	2
1. Salesforce	4 - 6
2.Object	7 - 11
3.Tab	11 - 14
4.The Lighthing App	14 - 17
5.Fields & Relationships	18 - 55
6.Validation rule	56 - 57
7.Profile	58 - 60
8.Roles	61- 62
9.Users	62 - 64
10.User Adoption	64 - 66
11.Reports	67 - 68
12.Dashboards	69 - 70
13.Flows	71 - 85

TASK 1- Salesforce

Introduction:

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

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

What Is Salesforce?

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

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

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

<https://youtu.be/r9EX3lGde5k>

Activity 1- Creating Developer Account

Creating a developer org in salesforce.

► Click on link <https://developer.salesforce.com/signup>

► 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

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.

Username : should be a combination of your name and company

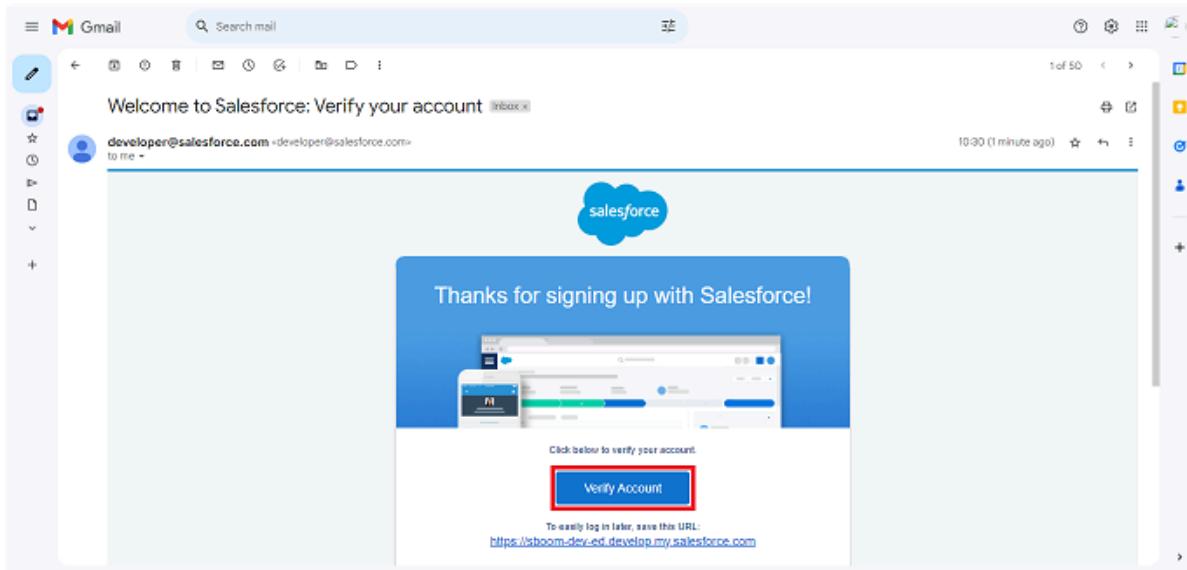
This need not be an actual email id, you can give anything in the format :

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.

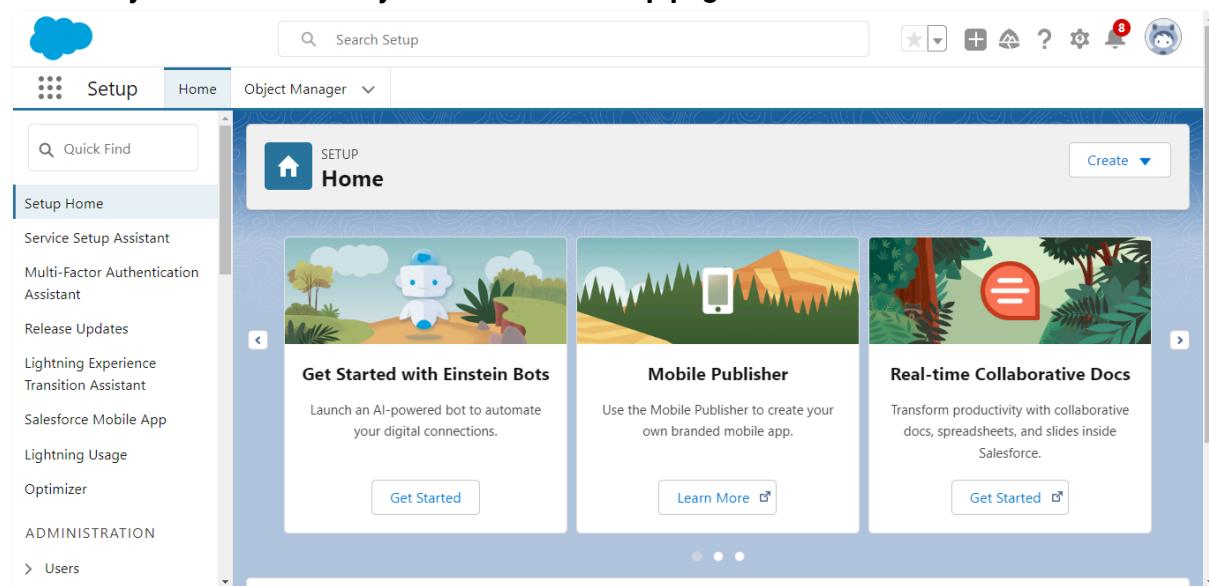


- 2 . Click on Verify Account

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

The screenshot shows a "Change Your Password" form. The instructions say: "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number". The "New Password" field contains "....." and is labeled "Good". The "Confirm New Password" field also contains "....." and is labeled "Match". Below these fields is a "Security Question" section with a dropdown menu showing "In what city were you born?". Underneath is an "Answer" field containing "asdfghjkl". At the bottom of the form is a large blue "Change Password" button, which is also highlighted with a red box.

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



Task 2 - Object

Introduction:

What Is an Object?

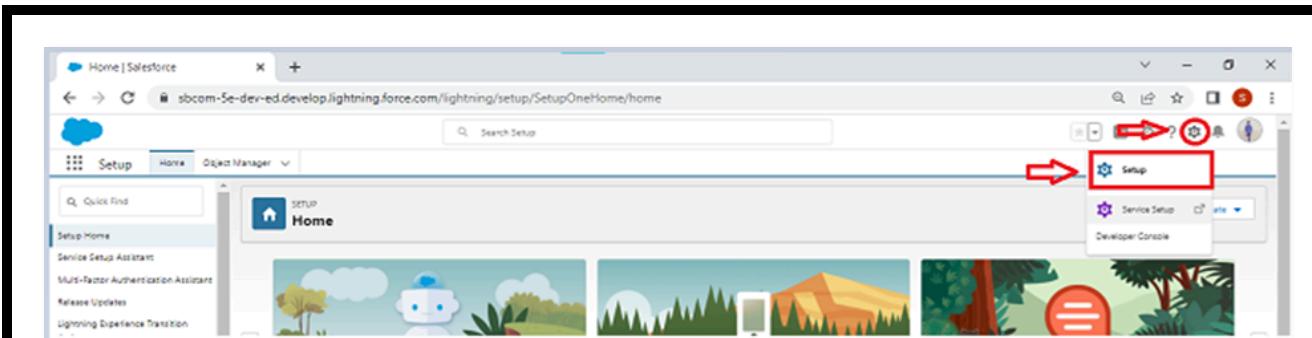
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

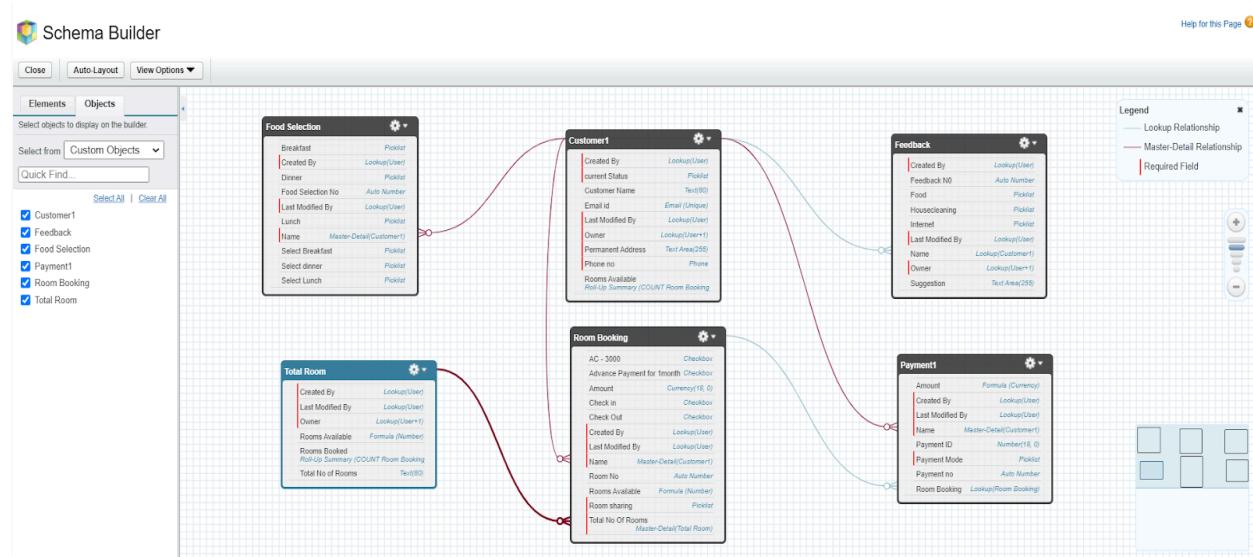
- 1. Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- 2. Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

To Navigate to Setup page:

Click on gear icon ? click setup



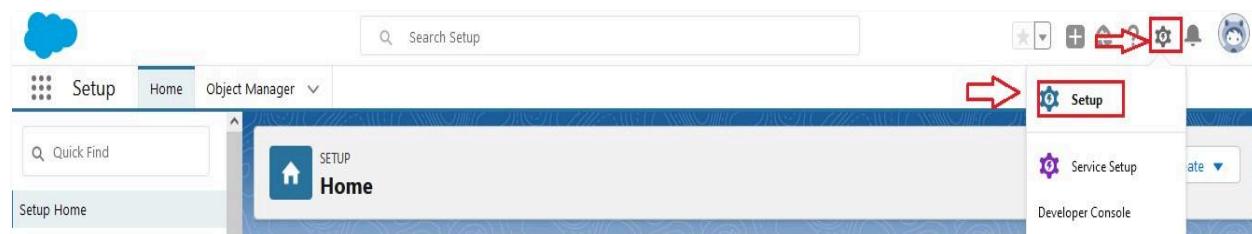
Objects and fields involved in Co-Living:



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.



Object Manager

1. Object Manager

2. Create

3. 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.

New Custom Object

1. Label: Total Room
Plural Label: Total Rooms

2. Object Name: Total_Rooms

3. Data Type: Text

Optional Features:
 Allow Reports
 Allow Activities
 Track Field History
 Create Change Groups
 Enable Licensing

Deployment Status:
 Development
 Deployed

Search Status:
 Allow Search

Object Creation Options (Available only when custom object is first created):
 Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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

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.

In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.Leave everything else as is, and click S

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.

Task-3 Tab

Introduction:

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

Types of Tabs:

1.Custom Tabs

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

2.Web Tabs

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

3.Visual force Tabs

Visual force Tabs are custom tabs that display a Visual force page. Visual force 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)

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected. In the search bar at the top, 'Tabs' is typed. Below the search bar, there are two red boxes: one around the 'Tabs' tab itself and another around the 'Custom Object Tabs' section. The 'Custom Object Tabs' section contains a table with columns for 'Actions', 'Label', 'Tab Style', and 'Description'. A red box highlights the 'New' button at the top right of this table. The table lists various tabs, such as 'Activities', 'Address', 'Categories', 'Collaborators', 'Case', 'Events', 'Files', 'Notes', 'Opportunities', 'Phone', 'Comments', 'Tasks', and 'Users'. Each entry includes a small icon representing the tab style.

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

The screenshot shows the 'New Custom Object Tab' setup screen. Step 1, 'Enter the Details', is displayed. A red arrow points to the 'Object' dropdown menu, which is set to 'Total Room'. Another red arrow points to the 'Tab Style' dropdown menu, which is set to 'Keys'. To the right of the main screen, a 'Tab Style Selector' dialog box is open, showing a grid of various tab styles with corresponding icons. The styles include 'Airplane', 'Bank', 'Books', 'Building', 'Can', 'Cell phone', 'Circle', 'CRT TV', 'Dice', 'Form', 'Hammer', 'Heart', 'Hot Air Balloon', 'Keys', 'Alarm clock', 'Bell', 'Bottle', 'Building Block', 'Chalkboard', 'Compass', 'Cup[1]', 'Factory', 'Gears', 'Hands', 'Helicopter', 'Insect', 'Laptop', 'Big top', 'Box', 'Caduceus', 'Castle', 'Chess piece', 'Computer', 'Desk', 'Fan[1]', 'Globe', 'Hexagon', 'IP Phone', 'Leaf[1]', 'Balls', 'Bridge', 'Camera', 'CD/DVD', 'Credit card', 'Diamond', 'Flag', 'Guitar', 'Headset', 'Highway Sign', 'Jewel', and 'Lightning'.

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

SETUP Tabs

User Profile	Action
Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Salesforce API Only System Integrations	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Default On

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

SETUP Tabs

Tab Name	Action
Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Co-Living (CoLiving)	<input checked="" type="checkbox"/>

Append tab to users' existing personal customizations

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 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.

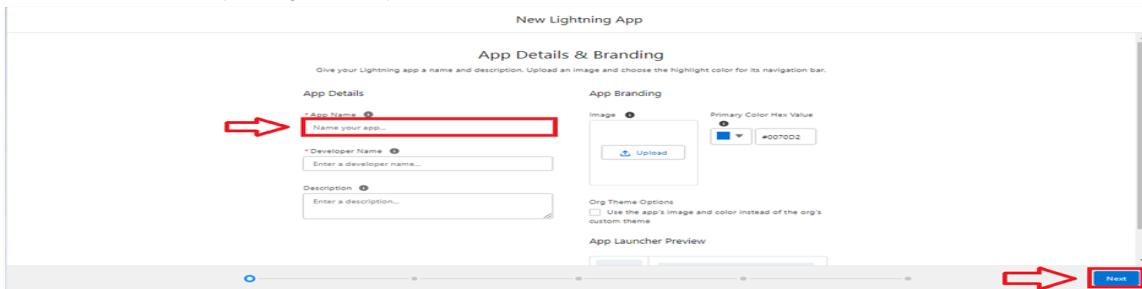
Activity1 - Create a Lightning App

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

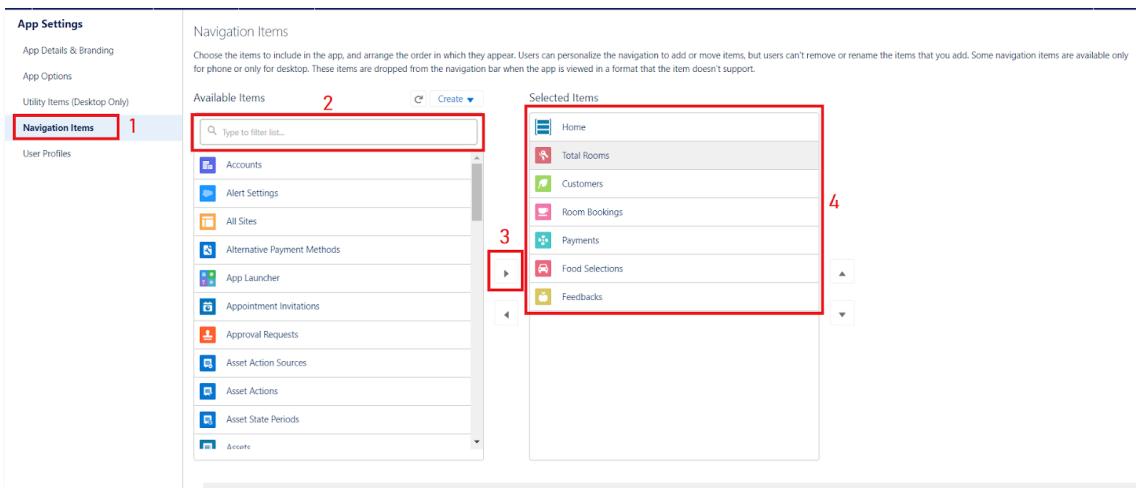
The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'Search Setup' and a 'Search' icon. Below the search bar, there are tabs for 'Setup', 'Home', and 'Object Manager'. A red box highlights the 'App Manager' tab. In the center, there's a section titled 'Lightning Experience App Manager' with a blue header. A red arrow points to the 'New Lightning App' button in the top right corner of this section. Another red arrow points to the 'Clone Apps(Beta)' link below the title. The main area displays a list of 35 apps, with columns for 'App Name', 'Developer Name', 'Description', 'Last Modified', 'App Type', and 'VLR'. The first few rows of the list are:

App Name	Developer Name	Description	Last Modified	App Type
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic
Bill Solutions	Lightningbill	Discover and manage business solutions designed for your industry	04/12/2022, 10:18 am	Lightning
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	28/12/2022, 4:04 pm	Connected (Varaged)
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fe...	28/12/2022, 4:05 pm	Connected (Varaged)
College Management System	Notdem	demo app	08/12/2022, 4:18 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning

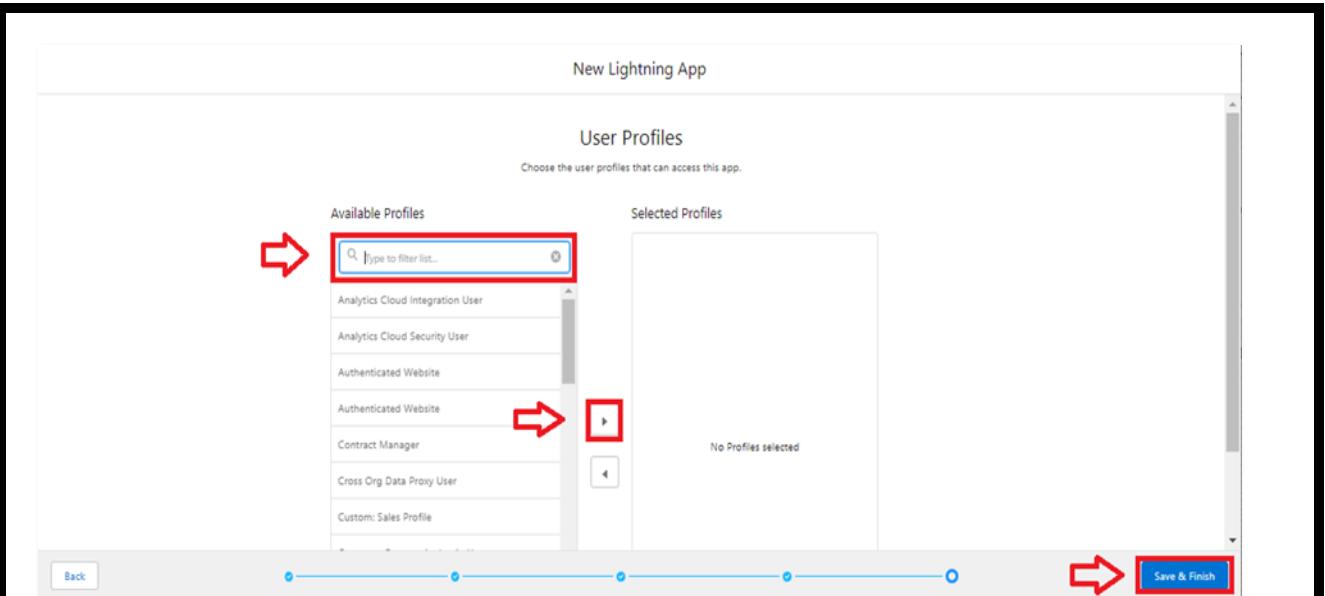
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > .



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



4. To Add User Profiles:



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

Task-5 Fields & Relationships

Introduction:

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

Types of Fields

- 1. Standard Fields**
- 2. Custom Fields**

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete

them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are

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

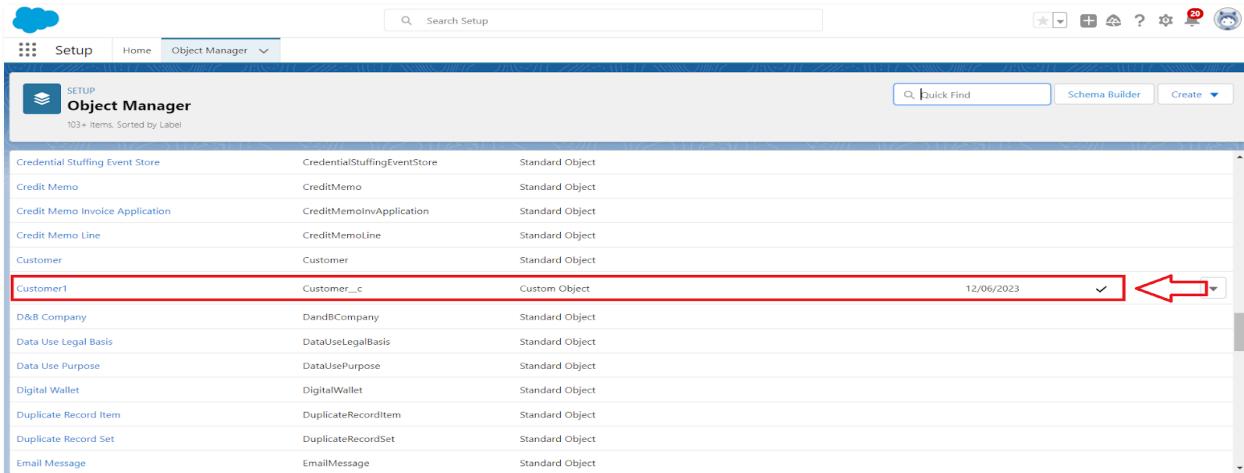
Custom Fields:

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

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.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'SETUP', 'Home', and 'Object Manager'. The main area is titled 'Object Manager' with the subtitle '103+ items. Sorted by Label'. A table lists various objects with their API names and types. The row for 'Customer1' is highlighted with a red box and has a red arrow pointing to its creation date field ('12/06/2023').

Object	API Name	Type
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object
Credit Memo	CreditMemo	Standard Object
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object
Credit Memo Line	CreditMemoLine	Standard Object
Customer	Customer	Standard Object
Customer1	Customer__c	Custom Object
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

- 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

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

4. Click on next

Setup > OBJECT MANAGER Customer1

Custom Field Definition Edit

Field Information

- Field Label: Phone no
- Field Name: Phone_no
- Data Owner: User
- Field Usage: -None-
- Data Sensitivity Level: -None-
- Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) Chosen (None)

General Options

- Required: Always require a value in this field in order to save a record
- Default Value: Show Formula Editor
- Save | Cancel

5. Fill the Above as following:

- **Field Label:** Phone no
- **Field Name :** gets auto generated
- Click on Next > Next > Save and new.

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

Setup > Object Manager

Object Name	Object API Name	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	
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

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

FIELD LABEL

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		

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

3. Select Data type as a "Email" and Click on Next

Setup > OBJECT MANAGER

Room Booking

Fields & Relationships

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

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) (1)
- Time
- URL

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

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

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

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

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

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

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

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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40 00", and "14:40 50 600" are all valid times for this field.

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

4. Fill the Above as following:

Setup > OBJECT MANAGER

Room Booking

Fields & Relationships

Details

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Step 2. Enter the details

Field Label: Room Sharing (1)

Values: Enter values, with each value separated by a new line 2

Single sharing
Double sharing
Triple sharing

Display values alphabetically, not in the order entered

Use first value as default value (1)

Restrict picklist to the values defined in the value set (1)

Field Name: Room_Sharing (1)

Description:

Help Text:

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

Auto add to custom report types: Add this field to existing custom report types that contain this entity (1)

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes. (Text_Next) include numbers without quotes (24). Show percentages as decimal (3.0), and express date calculations in the standard format: (Today) + 1. To reference a field from a Custom Metadata type record use: \$CustomMetadataType__name\$!RecordName!FieldName

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

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

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 'Room Booking' row in the list, which is a custom object ('Custom Object'). A red arrow points from the 'Object Manager' tab to the 'Room Booking' row. A second red arrow points from the 'Room Booking' row to the 'Last Modified Date' field, which is set to '07/06/2023'.

Object Name	Object API Name	Object Type	Last Modified 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

The screenshot shows the 'Fields & Relationships' page for the 'Room Booking' object. A red box highlights the 'Room Booking' object name in the top navigation bar. Another red box highlights the 'Fields & Relationships' tab in the left sidebar. A third red box highlights the 'New' button in the top right corner of the main table area. A fourth red arrow points from the 'Fields & Relationships' tab to the 'FIELD NAME' column header.

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(Customer1)		
Room No	Name	Auto Number	

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

- 4.Fill the Above as following:

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

- None-
- Conversation
- Credit Memo
- Credit Memo Invoice Application
- Credit Memo Line
- Customer
- Entitlement
- Feedback
- Food Selection
- Individual
- Incident Related Item
- Individual
- Legal Entity
- Location
- Location Group

- **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**

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

Field Label

Field Name

Child Relationship Name

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records.

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

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

Allow reparenting

Child records can be reparented to other parent records after they are created

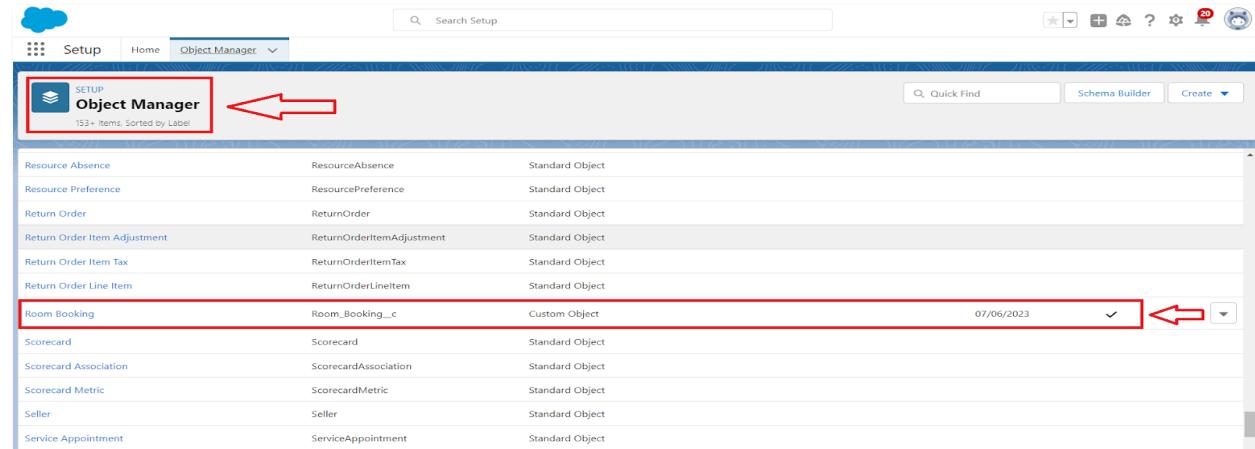
Add this field to existing custom report types that contain this entity

- **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.



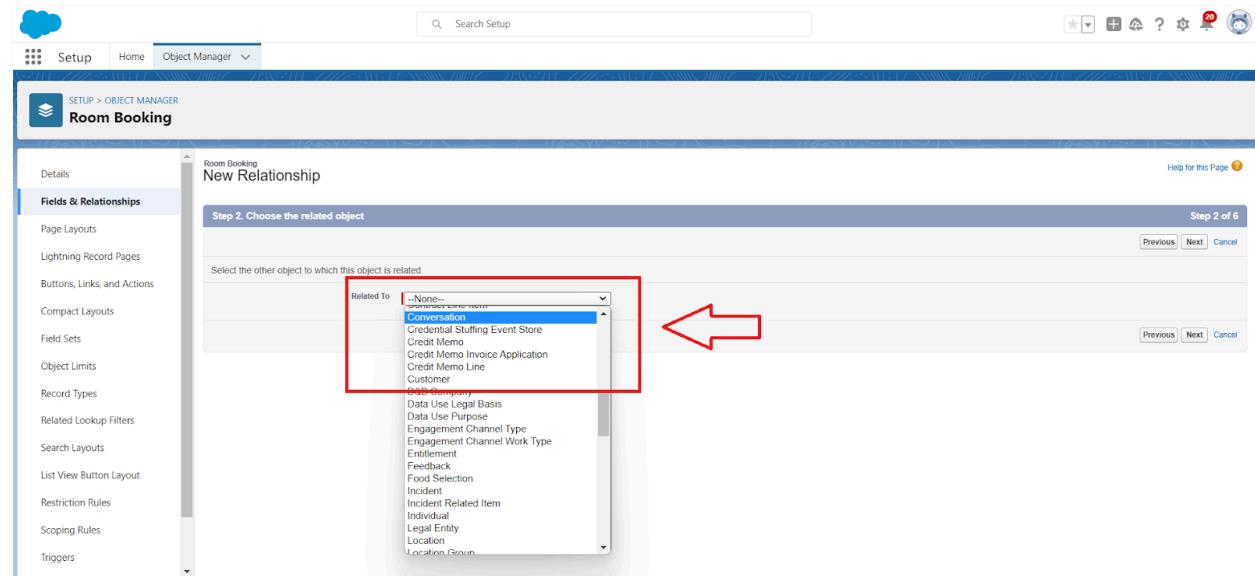
Object Name	Object Label	Type	Last Modified
Resource Absence	ResourceAbsence	Standard Object	
Resource Preference	ResourcePreference	Standard Object	
Return Order	ReturnOrder	Standard Object	
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object	
Return Order Item Tax	ReturnOrderItemTax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

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

3. Select Data Type as a “Picklist”

4. Click on Next

5. Fill the Above as following:



Step 2. Choose the related object

Select the other object to which this object is related.

Related To

- None-
- Conversation
- Credential Stuffing Event Store
- Credit Memo
- Credit Memo Invoice Application
- Credit Memo Line
- Customer
- Data Use Company
- Data Use Legal Basis
- Data Use Purpose
- Engagement Channel Type
- Engagement Channel Work Type
- Entitlement
- Feedback
- Food Selection
- Incident
- Incident Related Item
- Individual
- Legal Entity
- Location
- Location Group

•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

The screenshot shows the 'Room Booking New Relationship' setup page. The 'Field Label' and 'Field Name' fields are both set to 'Name'. The 'Child Relationship Name' field is set to 'Room_Bookings'. Red boxes and arrows highlight these three fields.

- 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.

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.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it, the title 'Food Selection' is displayed. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, etc. In the center, a table titled 'Fields & Relationships' lists ten items. The columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The rows include fields such as Breakfast, Created By, Dinner, Food Selection No, Last Modified By, Lunch, Name, Select Breakfast, and Select dinner. At the top of the table area, there are buttons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Red boxes with arrows point to the 'Food Selection' button, the 'Fields & Relationships' link, the 'New' button, and the 'Field Dependencies' link.

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

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

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 Roll up Summary Field in “Total Room Object”

1.After Creating the Master- Detail Relationship Than Only you can create the Roll up 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**

Total Room
New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object: Total Room
Summarized Object: Room Bookings

Select Roll-Up Type

COUNT SUM MIN MAX

Field to Aggregate:

Filter Criteria

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

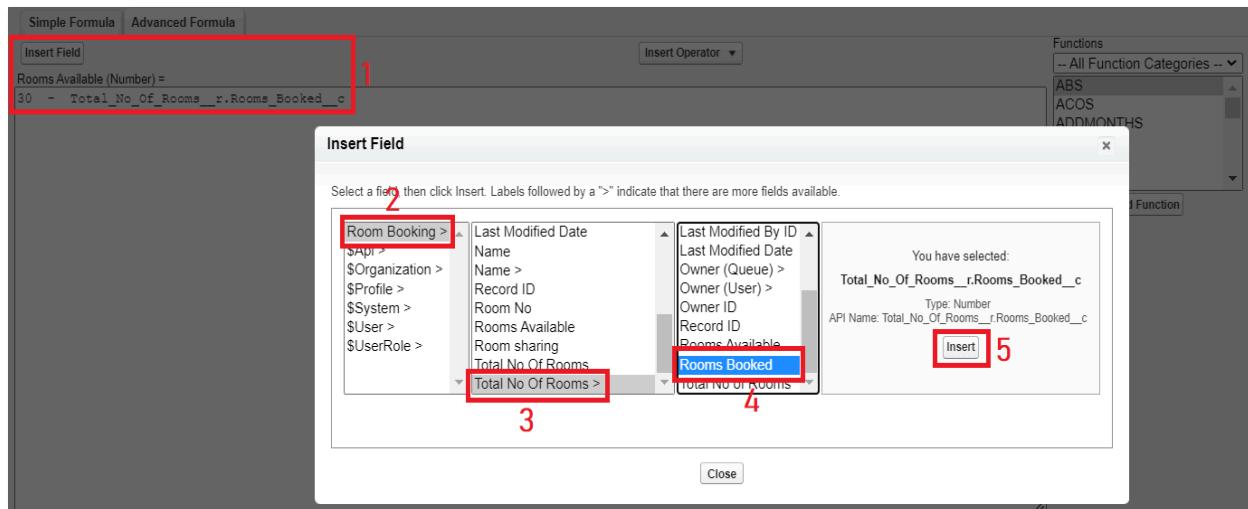
Help for this Page

Previous Next Cancel

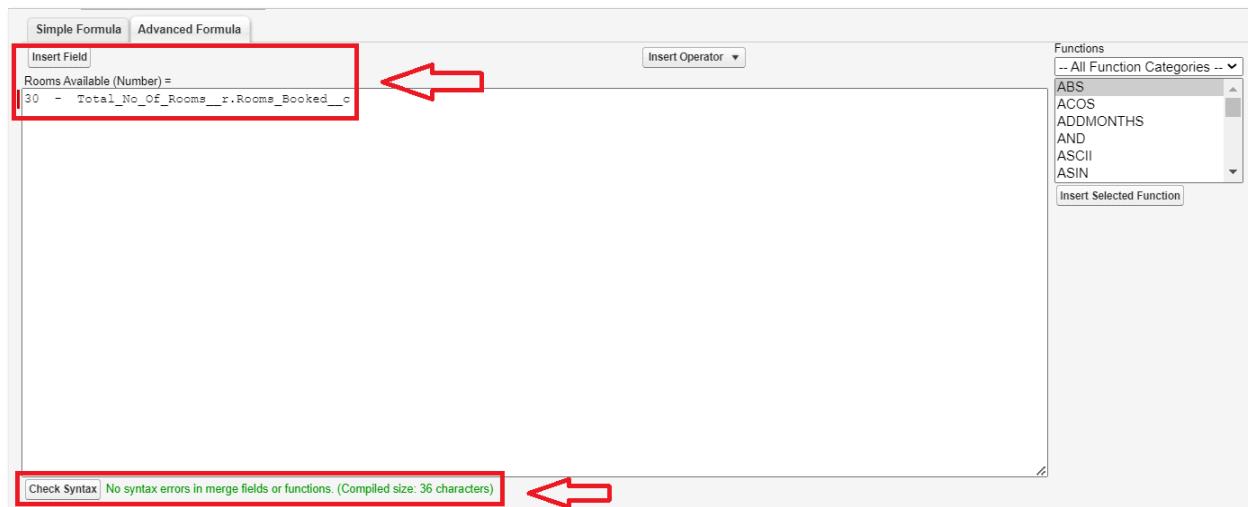
5. Select the Room Bookings in the Summarized Object
6. Select the count Radio button in the select Roll-up Type
- Click on Next > Next > Save and new.
7. Click on Next > Next > Save and new

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.
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.

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.
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.

Cross Object Formula Field:

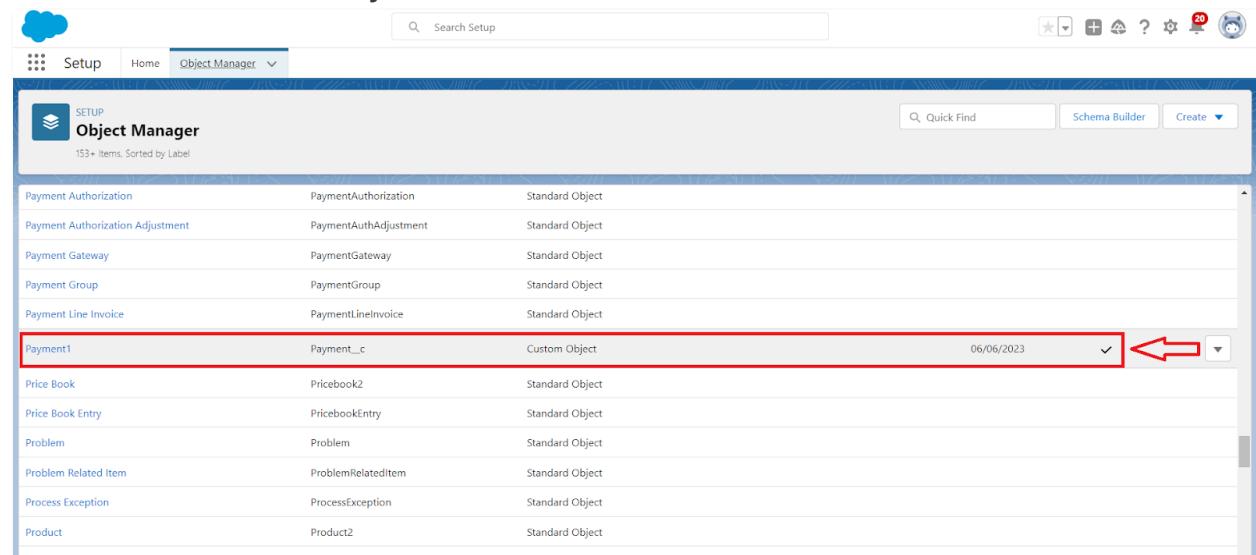
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

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.

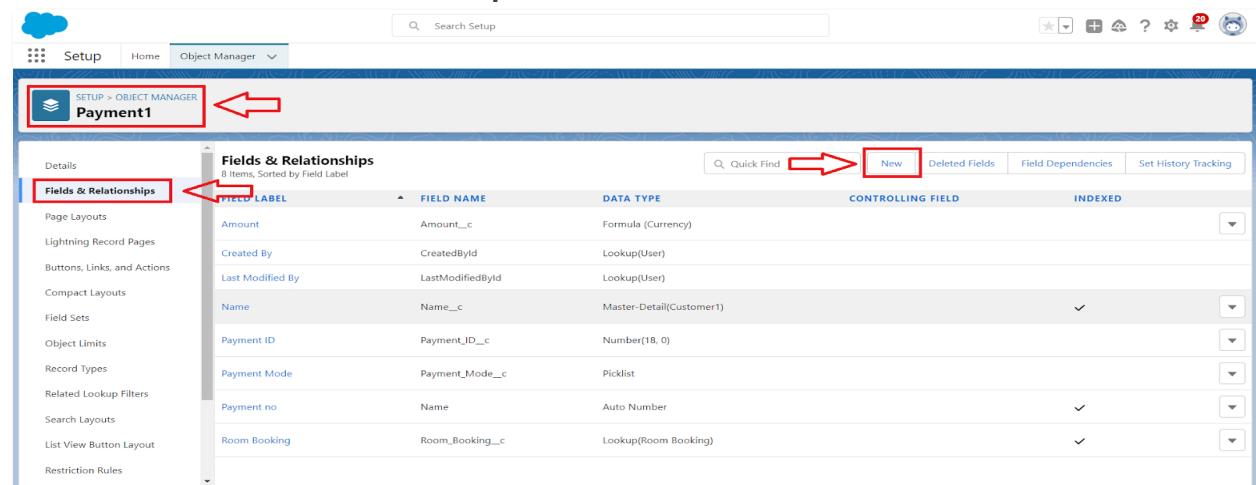
4. Create a Cross object formula Field in Payment1 Object

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', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. Below the header, there's a toolbar with various icons. The main area is titled 'Object Manager' and displays a list of objects. The 'Payment1' object is highlighted with a red box and selected. Its details are shown in the row: 'Payment1' is the label, 'Payment_c' is the field name, and 'Custom Object' is the type. The creation date '06/06/2023' is also visible. A red arrow points to the dropdown menu icon next to the creation date.

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



The screenshot shows the 'Fields & Relationships' page for the 'Payment' object. The top navigation bar shows 'SETUP > OBJECT MANAGER' and the object name 'Payment'. A red box highlights the 'Fields & Relationships' link in the sidebar, and a red arrow points to it. Another red box highlights the 'New' button in the top right corner of the main table area, and a red arrow points to it. The main table lists existing fields with columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. A red box highlights the 'FIELD NAME' column header.

3. Select Data Type as a "Formula"

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)		

4.Click on Next

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

SETUP > OBJECT MANAGER
Payment1

Field Label: Amount

Field Name: Amount

Formula Return Type:

- None Selected
- Checkbox
- Currency
- Date
- Date/Time
- Number
- Percent
- Text
- Time
- Options

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.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' button in the top left. Another red box highlights the 'Food Selection' row in the list, which is also circled in red. A red arrow points from the 'Object Manager' button towards the highlighted row. The 'Food Selection' row contains the following information: Name: Food Selection, Label: Food_Selection__c, Type: Custom Object, Created Date: 05/06/2023, Last Modified Date: 05/06/2023.

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

The screenshot shows the Salesforce Fields & Relationships page for the 'Customer1' object. A red box highlights the 'Customer1' object name in the top left. Another red box highlights the 'Fields & Relationships' tab in the sidebar. A red arrow points from the 'Customer1' object name towards the 'Fields & Relationships' tab. The main table lists various fields with their labels, names, data types, controlling fields, and indexing status. A red box highlights the 'New' button in the top right corner of the table header. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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 "Master-detail Relationship"

Customer1

Fields & Relationships

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

4. Click on Next

Food Selection

Data Type

Master-Detail 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 relationship field is required on all detail records.
- The ownership and sharing of a detail record 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.

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

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

Food Selection

New Relationship

Step 2. Choose the related object

Select the other object to which this object will be related:

Related to: **Customer1**

6. Fill the Above as following:

The screenshot shows the 'Food Selection' object setup page in Salesforce. The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Record Types. The main area is titled 'Step 3. Enter the label and name for the lookup field'. It contains fields for 'Field Label' (set to 'Name'), 'Field Name' (auto-generated as 'Name'), 'Description', 'Help Text', 'Child Relationship Name' (set to 'Food Selections'), and 'Sharing Settings' (ReadWrite selected). Buttons at the bottom include 'Previous', 'Next', and 'Cancel'.

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

Picklist value sets:

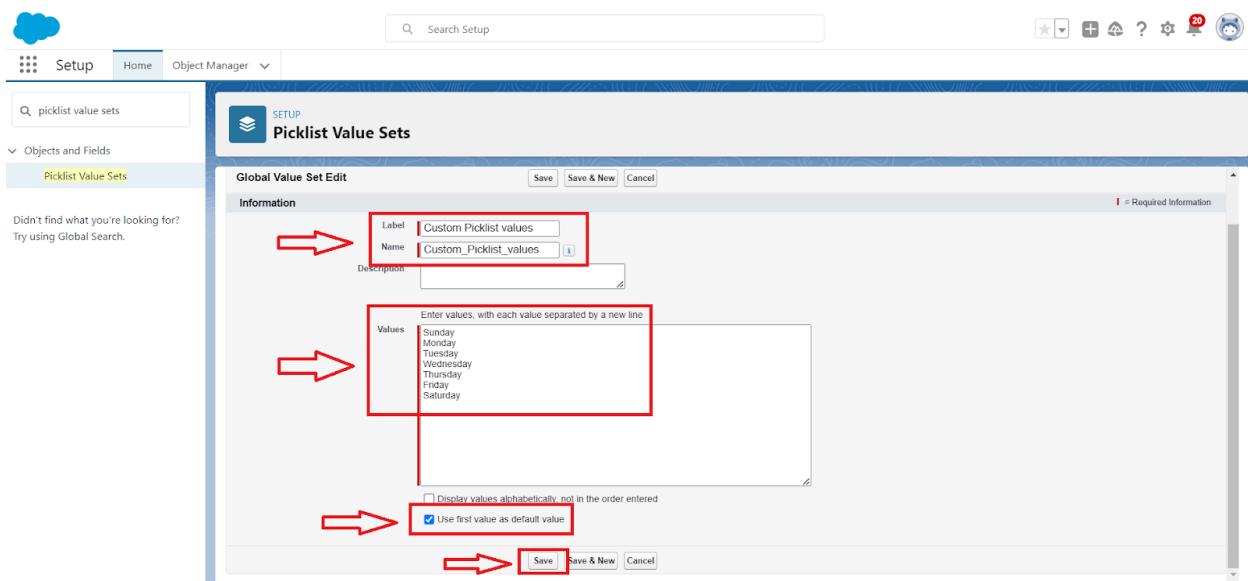
Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

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 "

The screenshot shows the 'Picklist Value Sets' page in Salesforce. The top navigation bar has 'Home' selected. A search bar on the left contains 'picklist value sets'. The main content area is titled 'Picklist Value Sets' and includes a 'New' button highlighted with a red arrow. The page explains that global picklist value sets share values across objects and base custom picklist fields on a global value set to inherit its values. It also notes that the value set is restricted so users can't add unapproved values through the API.

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.

The screenshot shows the Salesforce Object Manager page. At the top left, there is a blue header bar with the word "SETUP" and a "Home" button. Below it, the "Object Manager" tab is selected. A red box highlights the "Object Manager" tab, and a red arrow points to it from the left. In the center, a table lists various objects. One row, "Food Selection", is highlighted with a red box. To the right of the "Food Selection" row, there is a date field containing "05/06/2023" with a dropdown arrow. A red arrow points to this dropdown arrow from the right.

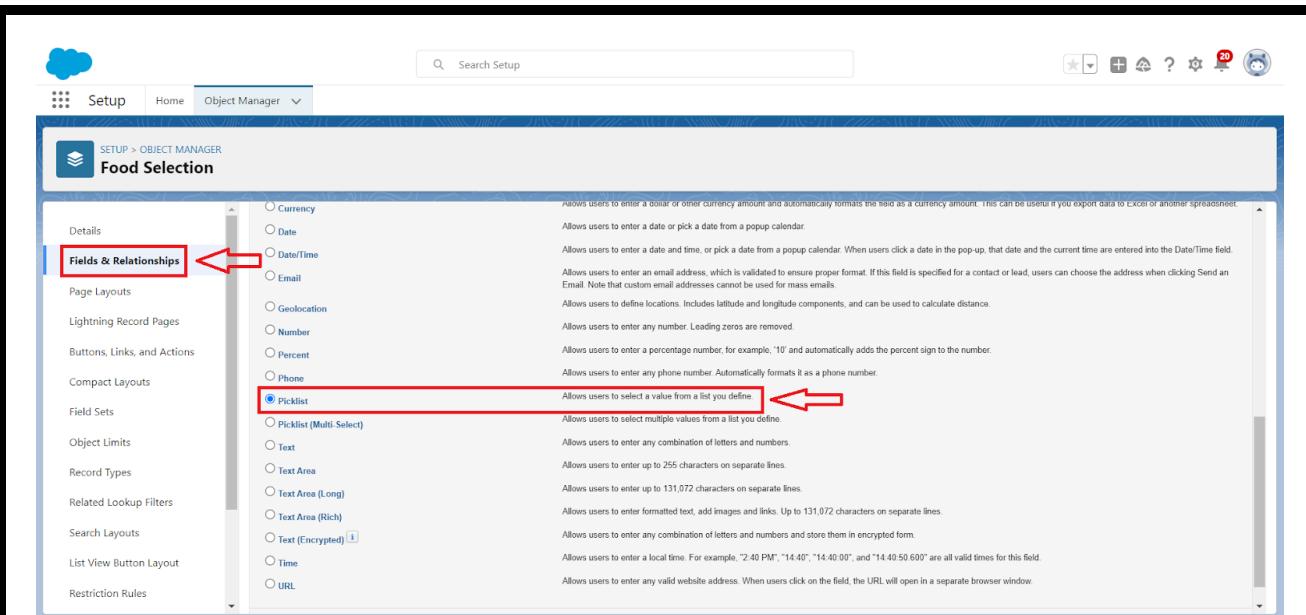
Object	Label	Type
Entitlement Contact	EntitlementContact	Standard Object
Event	Event	Standard Object
Feedback	Feedback_c	Custom Object
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object
Food Selection	Food_Selection_c	Custom Object
Image	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

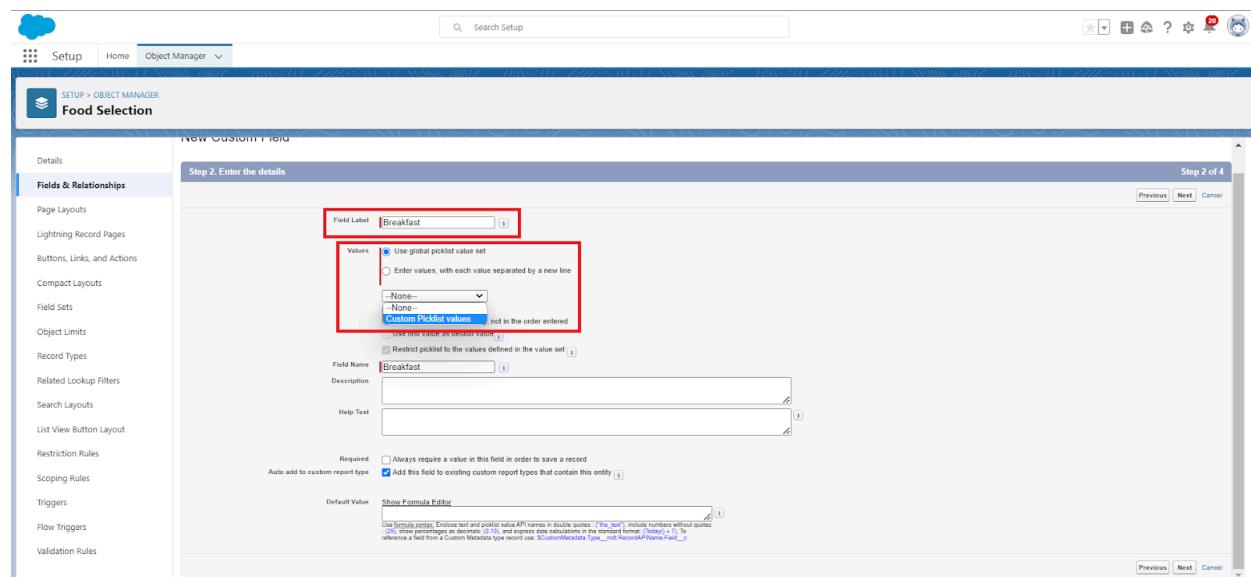
The screenshot shows the "Fields & Relationships" page for the "Food Selection" object. At the top left, there is a blue header bar with the word "SETUP > OBJECT MANAGER" and a "Food Selection" tab. A red box highlights the "Food Selection" tab, and a red arrow points to it from the left. On the left side, there is a sidebar with various options like "Details", "Fields & Relationships" (which is selected and highlighted with a red box), and "Page Layouts". In the main area, there is a table titled "Fields & Relationships". A red box highlights the "New" button at the top right of the table, and a red arrow points to it from the right. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast_c	Picklist		
Created By	CreatedBy	Lookup(User)		
Dinner	Dinner_c	Picklist		
Food Selection No	Name	Auto Number		
Last Modified By	LastModifiedBy	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 “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.

Object Name	API Name	Type	Last Modified	Action
Entitlement Contact	EntitlementContact	Standard Object		
Event	Event	Standard Object		
Feedback	Feedback_c	Custom Object	07/06/2023	▼
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object		
Finance Transaction	FinanceTransaction	Standard Object		
Food Selection	Food_Selection__c	Custom Object	05/06/2023	▼
Image	Image	Standard Object		
Incident	Incident	Standard Object		
Incident Related Item	IncidentRelatedItem	Standard Object		
Individual	Individual	Standard Object		
Invoice	Invoice	Standard Object		
Invoice Line	InvoiceLine	Standard Object		
Lead	Lead	Standard Object		

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

2. Select Data Type as a “Picklist”

a. Fill the Above as following

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Field Label:

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Id
Bonda
Dosa
Upma
Vada
Puttu
Chapati

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name:

Description:

Help Text:

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

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

Default Value:

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"), include numbers without quotes (12), show percentages as decimals (.12), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use {CustomMetadata_Type__mdt__r.Field__c}

• 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.

Field Dependency:

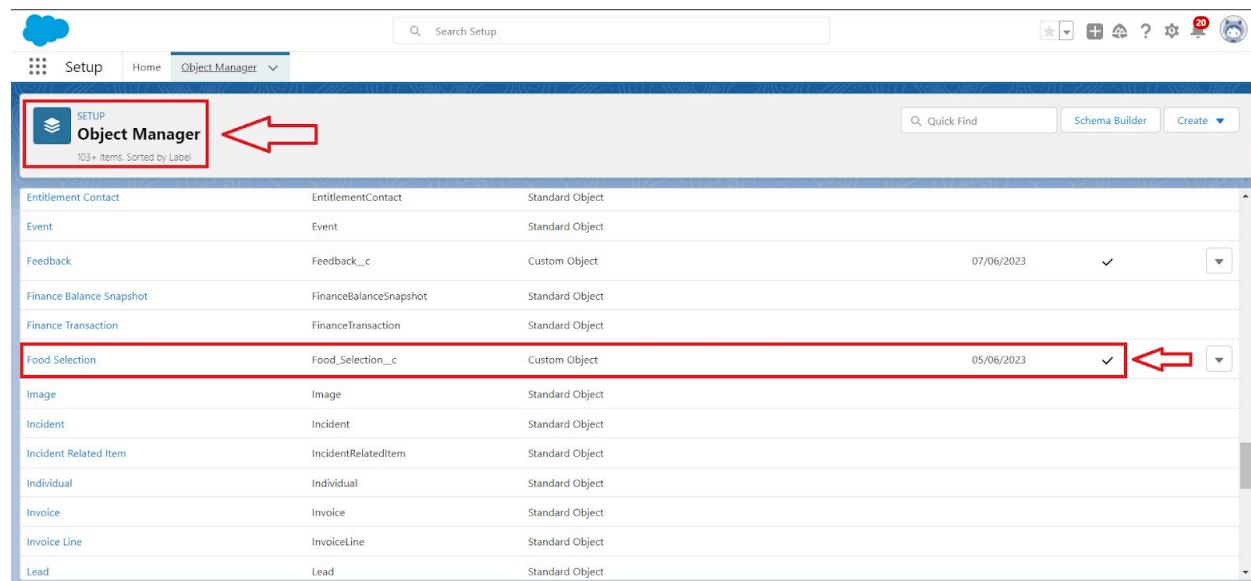
A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by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

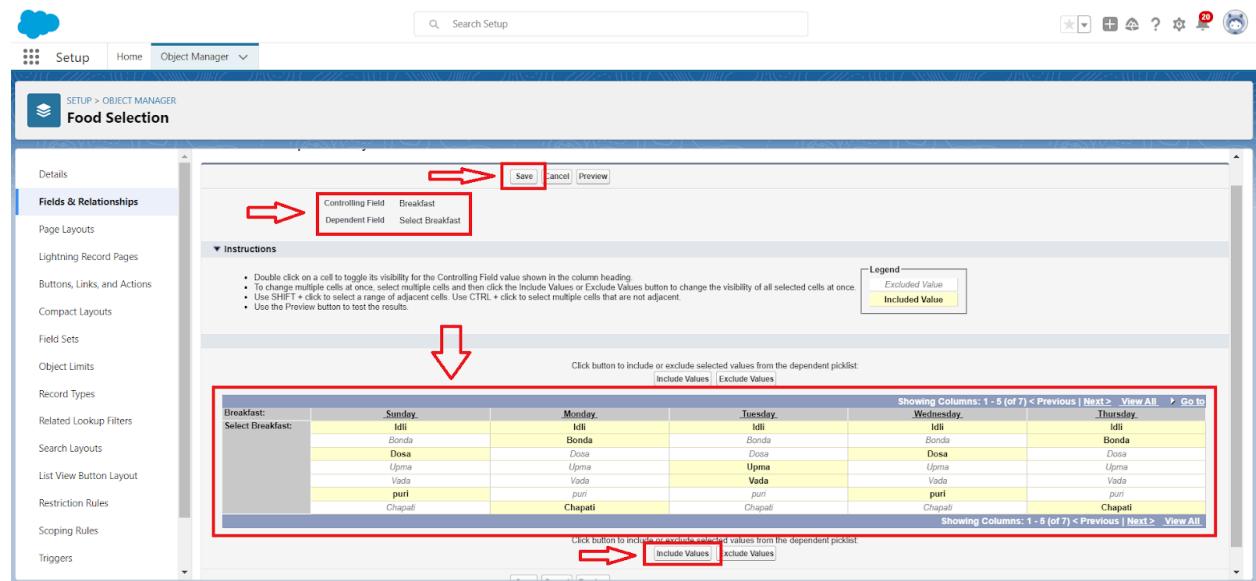
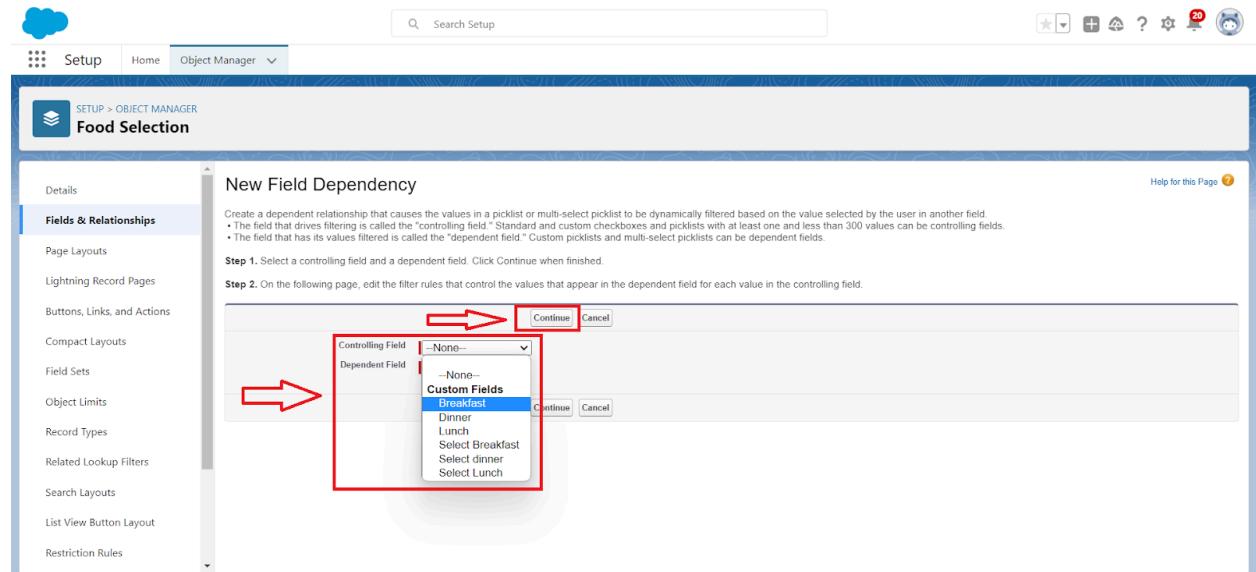
1.Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'SETUP' and 'Object Manager' selected. Below the navigation bar, a search bar says 'Search Setup'. The main area displays a list of objects. The 'Food Selection' object is highlighted with a red box and a red arrow pointing to it from the left. Another red arrow points to the dropdown menu icon next to the 'Food Selection' row. The list includes various standard and custom objects like Entitlement Contact, Event, Feedback, Finance Balance Snapshot, Finance Transaction, Image, Incident, Incident Related Item, Individual, Invoice, Invoice Line, and Lead.

Object Name	API Name	Type	Last Modified	Action
Entitlement Contact	EntitlementContact	Standard Object		
Event	Event	Standard Object		
Feedback	Feedback_c	Custom Object	07/06/2023	▼
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object		
Finance Transaction	FinanceTransaction	Standard Object		
Food Selection	Food_Selection__c	Custom Object	05/06/2023	▼
Image	Image	Standard Object		
Incident	Incident	Standard Object		
Incident Related Item	IncidentRelatedItem	Standard Object		
Individual	Individual	Standard Object		
Invoice	Invoice	Standard Object		
Invoice Line	InvoiceLine	Standard Object		
Lead	Lead	Standard Object		

- 2. Now Click on fields & relationships 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**

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.

The screenshot shows the Salesforce Object Manager. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A red box highlights 'Food Selection' in the search bar. On the left, a sidebar lists various object types like Details, Page Layouts, Lightning Record Pages, etc. A red box highlights the 'Fields & Relationships' link under the 'Fields & Relationships' heading. The main content area is titled 'Fields & Relationships' with a sub-header '10 Items, Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Red boxes highlight the 'New' button at the top right of the table and the 'FIELD LABEL' column header. The table data includes:

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	

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.

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

- 2.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.

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	Breakfast	
Name	Name_c	Master-Detail(Customer1)		
Select Breakfast	Select_Breakfast_c	Picklist		
Select dinner	Select_dinner_c	Picklist	Dinner	

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.

The screenshot shows the Salesforce Object Manager interface for the 'Food Selection' object. The left sidebar lists various setup categories like Details, Page Layouts, and Field Sets. The main area is titled 'Fields & Relationships' and shows a table of existing fields. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Fields listed include Breakfast, Created By, Dinner, Food Selection No, Last Modified By, Lunch, Name, Select Breakfast, and Select dinner. A red arrow points to the 'New' button at the top right of the table header.

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.

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

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	

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

3. Now Click on New Option

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

5. 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.

Edit Field Dependency

Instructions

- 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.

Legend

Excluded Value	Included Value
----------------	----------------

Sunday

Chicken	chicken biryani	Veg	veg biryani	Veg	veg fried rice	Egg	Egg Fried rice	chicken	chicken fried rice	Curd	curd rice	Tomato	Tomato rice	Egg	Egg noodles	chicken	chicken noodles	Bhag	bhagare rice
noodles	biryani	fried rice	biryani	fried rice	rice	Fried rice	noodles	noodles	noodles	rice	rice	noodles	noodles	noodles	noodles	noodles	noodles	rice	

Monday

Meat	chicken biryani	Meat	veg biryani	Meat	veg fried rice	Meat	Egg Fried rice	Meat	chicken fried rice	Meat	curd rice	Meat	Tomato rice	Meat	Egg noodles	Meat	chicken noodles	Meat	bhagare rice

Tuesday

Meat	chicken biryani	Meat	veg biryani	Meat	veg fried rice	Meat	Egg Fried rice	Meat	chicken fried rice	Meat	curd rice	Meat	Tomato rice	Meat	Egg noodles	Meat	chicken noodles	Meat	bhagare rice

Wednesday

Meat	chicken biryani	Meat	veg biryani	Meat	veg fried rice	Meat	Egg Fried rice	Meat	chicken fried rice	Meat	curd rice	Meat	Tomato rice	Meat	Egg noodles	Meat	chicken noodles	Meat	bhagare rice

Thursday

Meat	chicken biryani	Meat	veg biryani	Meat	veg fried rice	Meat	Egg Fried rice	Meat	chicken fried rice	Meat	curd rice	Meat	Tomato rice	Meat	Egg noodles	Meat	chicken noodles	Meat	bhagare rice

Friday

Meat	chicken biryani	Meat	veg biryani	Meat	veg fried rice	Meat	Egg Fried rice	Meat	chicken fried rice	Meat	curd rice	Meat	Tomato rice	Meat	Egg noodles	Meat	chicken noodles	Meat	bhagare rice

Saturday

Meat	chicken biryani	Meat	veg biryani	Meat	veg fried rice	Meat	Egg Fried rice	Meat	chicken fried rice	Meat	curd rice	Meat	Tomato rice	Meat	Egg noodles	Meat	chicken noodles	Meat	bhagare rice

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

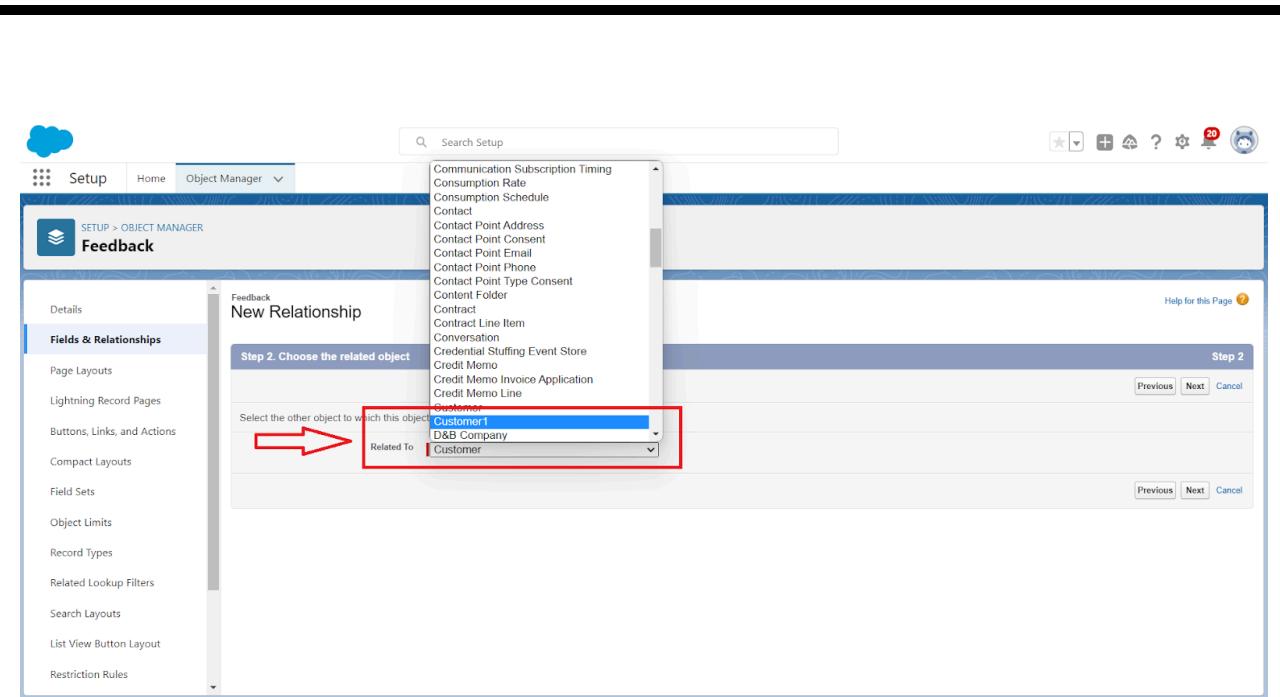
3.Select Data Type as a “Lookup Relationship”

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. In the list of objects, the 'Food Selection' row is highlighted with a red box. A red arrow points to the 'Data Type' dropdown menu, which is set to 'Custom Object'. Other objects listed include Entitlement Contact, Event, Feedback, Finance Balance Snapshot, Finance Transaction, Image, Incident, Incident Related Item, Individual, Invoice, Invoice Line, and Lead.

4.Click on Next

The screenshot shows the 'Fields & Relationships' configuration for the 'Feedback' object. The 'Fields & Relationships' tab is selected in the sidebar. In the main area, the 'Data Type' section is open, showing various options like 'None Selected', 'Auto Number', 'Formula', 'Roll-Up Summary', and 'Lookup Relationship'. The 'Lookup Relationship' option is selected and highlighted with a red box. A red arrow points to its description: '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 popup list. The other object is the source of the values in the list.' Other options like 'Master-Detail Relationship' and 'External Lookup Relationship' are also listed.

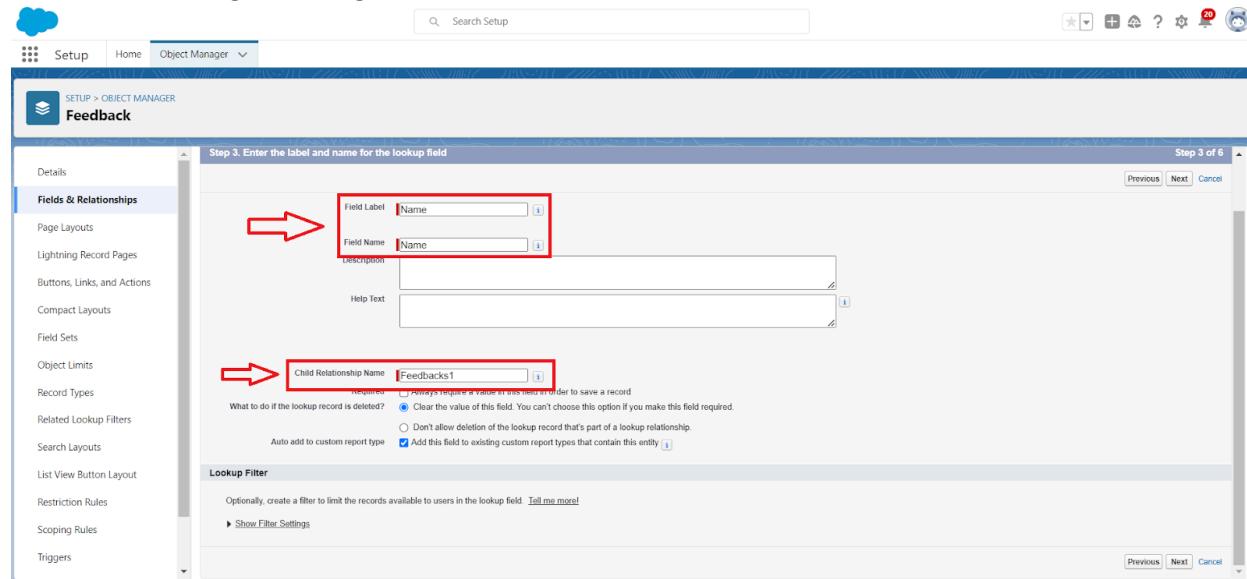
5.Click on the Related to drop down and Select the Customer1 object and click on Next



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.

Object Manager

Object Name	Label	Type	Created Date	Action
Entitlement Contact	EntitlementContact	Standard Object		
Event	Event	Standard Object		
Feedback	Feedback_c	Custom Object	07/06/2023	▼
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object		
Finance Transaction	FinanceTransaction	Standard Object		
Food Selection	Food_Selection_c	Custom Object	05/06/2023	▼
Image	Image	Standard Object		
Incident	Incident	Standard Object		
Incident Related Item	IncidentRelateditem	Standard Object		
Individual	Individual	Standard Object		
Invoice	Invoice	Standard Object		
Invoice Line	InvoiceLine	Standard Object		
Lead	Lead	Standard Object		

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

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)
- Time
- URL

4. Click on Next

Setup > OBJECT MANAGER
Feedback

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
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Field Label: Roomcleaning

Values: Enter values, with each value separated by a new line
 Enter values, with each value separated by a new line
 Use global picklist value set
 Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set
 Add this field to existing custom report types that contain this entry

Field Name: Roomcleaning

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes. ('Value_Label'). Include numbers without quotes (12). Show percentages as decimals (.10), and express date calculations in the standard format ('Today') + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadataType__name\$RecordName\$Field__c

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 another fields in an same object

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

Setup > OBJECT MANAGER
Food Selection

Details

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(Customer1)		
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select dinner	Select_dinner__c	Picklist	Dinner	

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

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, which is also highlighted by a red arrow. The 'Food Selection' row contains fields: Name (Food Selection), Type (Custom Object), and Last Modified Date (05/06/2023).

3. Select Data Type as a “Picklist”

The screenshot shows the 'Food Selection' object's details page under 'Fields & Relationships'. A red box highlights the 'Fields & Relationships' tab in the left sidebar. Another red box highlights the 'Picklist' data type in the list of available types, which is also highlighted by a red arrow.

4. Click on Next

5. Fill the Above as following:

- Field Label: Internet
- Field Name :It's gets auto generated

The screenshot shows the 'Object Manager' setup screen for a custom object named 'Total Room'. A new field is being created with the following details:

- Field Label:** Rooms Available (highlighted with a red box)
- Field Name:** Rooms_Available (highlighted with a red box)
- Formula Return Type:** Number (highlighted with a red box)
- Decimal Places:** 0 (highlighted with a red box)

•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.

The screenshot shows the 'Object Manager' page with the following details:

Object Name	Object Label	Type	Last Modified
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	05/06/2023
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

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

3.Select Data Type as a “Picklist”

SETUP > OBJECT MANAGER
Food Selection

Details

Fields & Relationships [Red box]

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist [Red box]

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

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

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: Food

- Field Name :It's gets auto generated

SETUP > OBJECT MANAGER
Feedback

Details

Fields & Relationships [Red box]

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

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Field Label: Roomcleaning [Red box]

Values: Use global picklist value set
 Enter values, with each value separated by a new line [Red box]

Good
Satisfaction
Bad

Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set

Field Name: Roomcleaning [Red box]

Description:

Help Text:

Required: Always require a value in this field in order to save a record Add this field to existing custom report types that contain this entry

Auto add to custom report type:

Default Value: [Red box]

Use formula syntax: Enclose text and picklist value API names in double quotes ("text") include numbers without quotes. To reference a field from a Custom Metadata Type record use [CustomMetadata Type__mdt RecordName Field__c]

- 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 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

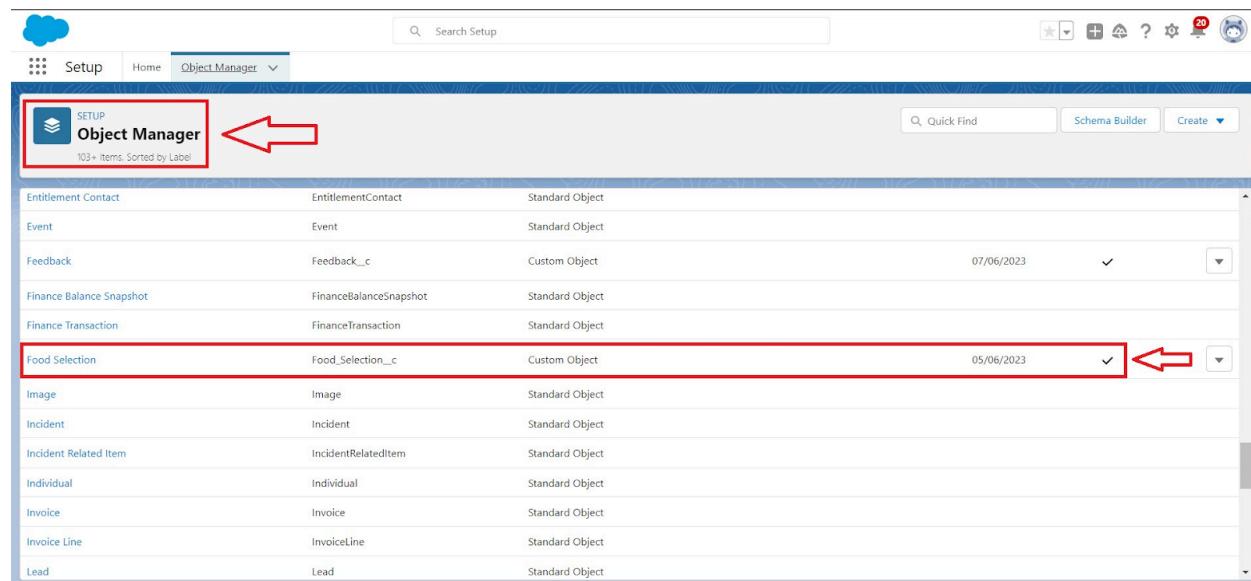
- Field Name : It's gets auto generated

- 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.



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager, with Object Manager being the active tab. A red box highlights the 'Object Manager' tab, and a red arrow points to it from the left. Below the tabs, a search bar contains 'Search Setup'. On the right side of the header, there are various icons for quick access. The main area displays a list of objects with columns for Name, API Name, and Object Type. One row for 'Food Selection' is highlighted with a red box and a red arrow pointing to its 'Object Type' column, which shows 'Custom Object'. Other objects listed include Entitlement Contact, Event, Feedback, Finance Balance Snapshot, Finance Transaction, Image, Incident, Incident Related Item, Individual, Invoice, Invoice Line, and Lead.

Name	API Name	Object Type
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

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.

Rooms Object.

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

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

The screenshot shows the Salesforce formula editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Advanced Formula" selected. Below the tabs, there's an "Insert Field" button and a dropdown menu for "Insert Operator". A red box labeled "7" highlights the formula input field, which contains the expression "30 - Rooms_Booked__c". To the right of the formula is a "Functions" sidebar with a dropdown for "All Function Categories" and a list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. An "Insert Selected Function" button is at the bottom of the sidebar. At the bottom of the editor, there's a status bar with the text "Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 36 characters)" followed by a red box labeled "8".

Task - 6 Validation rule

Introduction:

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

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

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

The screenshot shows the Salesforce Object Manager. In the top navigation bar, "Object Manager" is selected. On the left, a sidebar lists various object categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. A red box with an arrow labeled "1" points to the "Object Manager" tab. In the main content area, the object "Food Selection" is selected, indicated by a red box with an arrow labeled "2". The "Fields & Relationships" section is highlighted with a red box and an arrow labeled "3". This section displays a table of fields with columns for FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red box with an arrow labeled "4" points to the "New" button in the top right of the table header. The table rows include Breakfast, Created By, Dinner, Food Selection No, Last Modified By, Lunch, Name, Select_Breakfast, and Select_dinner.

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.

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.

The screenshot shows the Salesforce Object Manager interface for the 'Food Selection' object. The 'Fields & Relationships' tab is active. A red box highlights the 'Food Selection' object name in the top left. A red arrow points to the 'Fields & Relationships' tab. Another red arrow points to the 'New' button in the top right of the table header. The table lists various fields with their labels, field names, data types, controlling fields, and indexing status.

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Breakfast	Breakfast__c	Picklist		
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Dinner	Dinner__c	Picklist		
Compact Layouts	Food Selection No	Name	Auto Number		✓
Field Sets	Last Modified By	LastModifiedById	Lookup(User)		
Object Limits	Lunch	Lunch__c	Picklist		
Record Types	Name	Name__c	Master-Detail(Customer1)		✓
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					

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

Task - 7 Profile

Introduction:

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

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)

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top contains 'profile'. In the left sidebar, 'Profiles' is highlighted with a red arrow. The main area displays a table of profiles. A row for 'Standard User' is selected, indicated by a red arrow. Another red arrow points to the 'Edit | Clone' link next to the 'Standard User' row.

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

The screenshot shows the 'Clone Profile' dialog box. It prompts the user to 'Enter the name of the new profile.' Below this, a message states 'You must select an existing profile to clone from.' The 'Existing Profile' dropdown is set to 'Standard User'. The 'User License' dropdown is set to 'Salesforce'. The 'Profile Name' input field contains 'Custom user', with a red arrow pointing to it. At the bottom right of the dialog are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

3.While still on the profile page, then click Edit.

The screenshot shows the 'Edit' screen for a user profile. At the top, there are two tabs: 'Basic Access' and 'Data Administration'. Both tabs have columns for 'Read', 'Create', 'Edit', 'Delete', 'View All', and 'Modify All'. Red arrows point from the left and right towards the 'Data Administration' tab, which is currently selected. The 'Data Administration' tab shows checkboxes for each permission type across five objects: Customers, Feedbacks, Food Selections, Payments, Room Bookings, and Total Rooms. In the 'Basic Access' tab, the 'View All' and 'Modify All' checkboxes are checked for all objects except 'Payments'. In the 'Data Administration' tab, the 'View All' and 'Modify All' checkboxes are checked for all objects except 'Customers' and 'Feedbacks'.

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.

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.

The screenshot shows the 'Custom Object Permissions' section in the Salesforce Setup. It displays two sets of object permissions. The first set includes 'Customers', 'Feedbacks', and 'Food Selections'. The second set includes 'Payments', 'Room Bookings', and 'Total Rooms'. Each object has a row of checkboxes for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). Red arrows highlight the transition from the first group to the second group.

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

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.

Activity 3- Custom platform user2

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

2. Enter profile name (Custom platform User2) > 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.

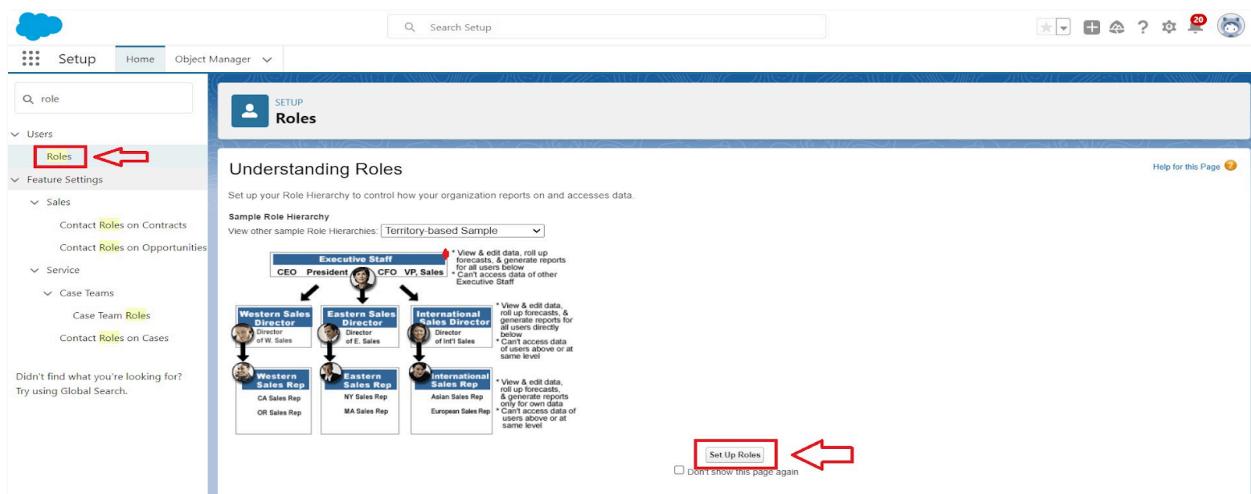
5. Scroll down and Click on Save.

Task - 8 Roles

Introduction:

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

Activity 1 - Marketing Role



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

Activity 2 -Receptionist Role

1. Go to quick find > Search for Roles > click on set up roles.
2. Click on Expand All and click on add role under CEO role.

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

4. Then click on Save

Role Edit
New Role

Role Edit

Role Name

This role reports to

Role Name as displayed on reports

Label Receptionist

Role Name Receptionist

CEO

Save Save & New Cancel

Task - 9 Users

Introduction:

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

Activity 1- Create User

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

2. Fill in the fields

Setup Home Object Manager

Search Setup

Users

All Users

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Androttu Veera Venkata Varaprasad	VAnir	newproject@thesmarbridge.com	System Administrator	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d500000dyw7ieav.48b1yqzghez@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	User_Integration	integ	integration@00d500000dyw7ieav.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00d500000dyw7ieav.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	Analytics Cloud Security User

• 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' screen under 'SETUP' > 'Users'. It's titled 'New User'. The 'General Information' section on the left contains fields for First Name (Sandeep), Last Name (gujja), Alias (sgujj), Email (sandeep@gmail.com), Username (gsandeep@sunny.com), and Nickname (sunny). The 'Role', 'User License', and 'Profile' section on the right contains Role (CEO), User License (Salesforce), and Profile (Custom user). Both sections are highlighted with red boxes and have red arrows pointing to them from the left and right respectively.

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: agar
Email: abhi@gmail.com
Username: gabhi@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

Setup

New User

General Information

First Name: Ganesh
Last Name: gelli
Alias: ogeli
Email: ganesh@gmail.com
Username: gganesh@tech.com
Nickname: Danni

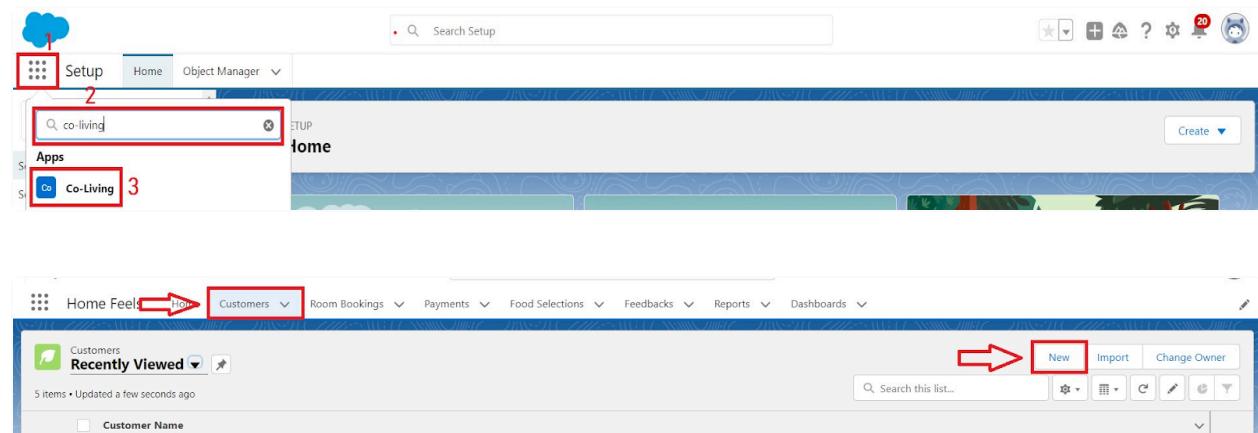
Role: Receptionist
User License: Salesforce Platform
Profile: Custom Platform user2
Active:

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.

The screenshot shows the 'New Customer1' form. At the top, it says 'New Customer1'. Below that is a section titled 'Information' with fields for 'Customer Name' (Text), 'Phone no' (9702874232), and 'Email id' (tech@gmail.com). To the right is an 'Owner' section showing 'Veera Venkata Varaprasad Androthu'. Further down are fields for 'Permanent Address' (Hyderabad) and 'current Status' (Employee). A large red box surrounds the entire 'Information' section. A red arrow points from the bottom of this box to the 'Save' button at the bottom of the form. The 'Save' button is highlighted with a red box. There are also 'Cancel' and 'Save & New' buttons.

- 4.Click new and fill details & Save

Activity 2 -View a Record (Customers)

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

The screenshot shows the app launcher interface. At the top, there is a navigation bar with tabs: Co-Living, Home (highlighted with a red box), Customers (highlighted with a red box), Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. Below the navigation bar is a search bar labeled 'Search...'. On the right side of the header are various icons for new items, import, change owner, and notifications. The main area is titled 'Recently Viewed' and shows a list of 5 items, all updated a few seconds ago. The first item in the list is 'Customer Name sandeep', which is also highlighted with a red box.

- 3.Click on Customer Tab.

The screenshot shows the customer details page for 'sandeep'. The top navigation bar has tabs: Home Feels, Home, Customers (highlighted with a red box), Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The main content area is titled 'Customer1 sandeep'. It displays the following details:

- 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
- Last Modified By: Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm

A large red box highlights the entire details section.

- 4.Click on any record name. you can see the details of the Customer.

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.

The screenshot shows the customer list page. The top navigation bar has tabs: Co-Living, Home, Customers (highlighted with a red box), Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The main content area is titled 'Recently Viewed' and shows a list of 5 items, all updated 2 minutes ago. The first item in the list is 'Customer Name sandeep', which is highlighted with a red box and labeled '2'. To the right of the list is a context menu with options: 'Edit' (highlighted with a red box and labeled '3'), 'Delete' (highlighted with a red box and labeled '4'), and 'Change Owner'. The 'Delete' option is currently selected.

- 4.Click on Arrow at right hand side on that Particular record.
- 5.Click delete and delete again.

Task - 11 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.

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with tabs like Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is highlighted with a red box and has a red number '2' above it), and Dashboards. Below the navigation is a search bar labeled 'Search recent reports...' and a 'New Report' button (also highlighted with a red box and has a red number '3' above it). On the left, there's a sidebar with sections for Reports, Recent (highlighted with a red box and has a red number '1' above it), Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains three rows of data:

Report Name	Description	Folder	Created By	Created On	Subscribed
Room booking report	custom report	Veera Venkata Varaprasad Androthu	14/6/2023, 2:58 pm		
Room booking report	Private Reports	Veera Venkata Varaprasad Androthu	7/6/2023, 4:53 pm		
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	5/6/2023, 10:09 am	

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

Create Report

Category
Recently Used
All 1
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders
Price Books, Products and Assets

Select a Report Type

Report Type Name

Category
Standard
Custom
Custom

5.Add fields from left pane as shown below

REPORT ▾
Room booking report ▾ Customers with Room Bookings with Payments

Save 2
Close Run

Fields > Outline > Filters 3

GROUP ROWS
Add group... 4

Customer Name 5

GROUP COLUMNS
Add group... 6

Customer Name 7

Columns 8

Room No 9

Phone no 10

Email id 11

Permanent Address 12

current Status 13

Room sharing 14

Advance payment for 1month 15

AC - 3000 16

Amount 17

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

Customer Name	Room No	Phone no	Email id	Permanent Address	current Status	Room sharing	Advance payment for 1month	AC - 3000	Amount
RN-006	7300768526	abhi@gmail.com	Chandravaram	Employee	single sharing - 14000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	₹28,000
Ganesh	868875423	ganesh@gmail.com	Tadiparvu	Student	Triple sharing - 10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	₹20,000
Subtotal						1	0	0	₹20,000
Prasad	9494724362	varaprasadandrohu@gmail.com	Tadiparvu	Employee	single sharing - 14000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	₹34,000
Subtotal						1	1	1	₹34,000
sandeep	RN-007	970526532	sandeep@gmail.com	Hyderabad	Employee	Triple sharing - 10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹20,000
	RN-003	970526532	sandeep@gmail.com	Hyderabad	Employee	Double sharing - 12000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹24,000
Subtotal						2	0	0	₹44,000
suman	RN-004	870587262	suman@gmail.com	Ichapuram	Employee	Double sharing - 12000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹30,000
Subtotal						1	1	1	₹30,000
Total						6	2	2	₹156,000

Update Preview Automatically

Row Counts Detail Rows Subtotals Grand Total Conditional Formatting

6.save

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

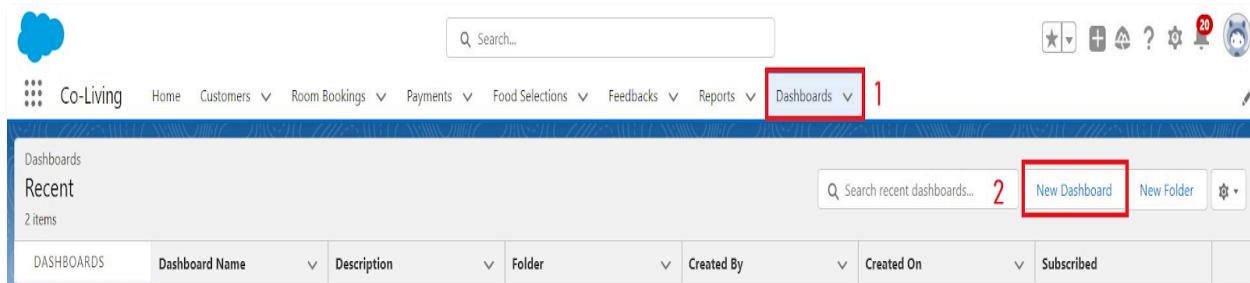
Task - 12 Dashboards

Introduction:

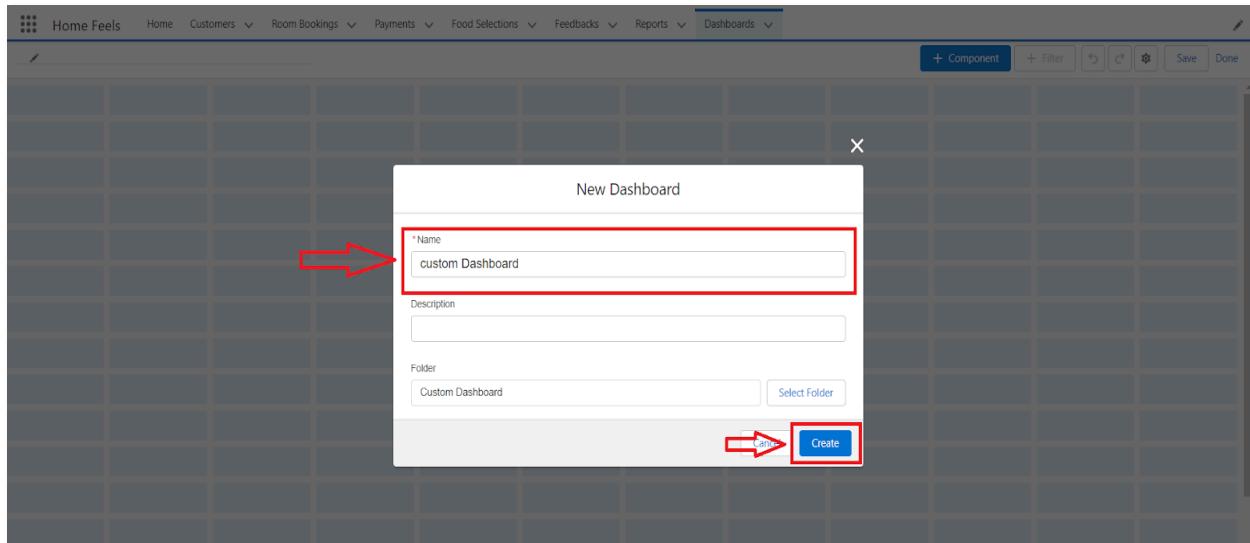
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Select Report

Reports	Recent
Created by Me	Room booking report Veera Venkata Varaprasad Androthu · 14-Jun-2023, 2:58 pm · custom report
Private Reports	Room booking report Veera Venkata Varaprasad Androthu · 07-Jun-2023, 4:53 pm · Private Reports
Public Reports	Sample Flow Report: Screen Flows Automated Process · 05-Jun-2023, 10:09 am · Public Reports
All Reports	
Folders	
Created by Me	
Shared with Me	
All Folders	

Edit Component

Room booking report

Subtitle

Amount

Footer

Legend Position

Right

Component Theme

Light (Dashboard default)

Dark

Customer Name

Customer Name	Color
Abhilash	Blue
Ganesh	Light Blue
Prasad	Purple
sandeep	Light Purple
suman	Teal

Sum of Amount: ₹156k

₹28k
₹20k
₹34k
₹44k
₹30k

View Report (Room booking report)

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

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.

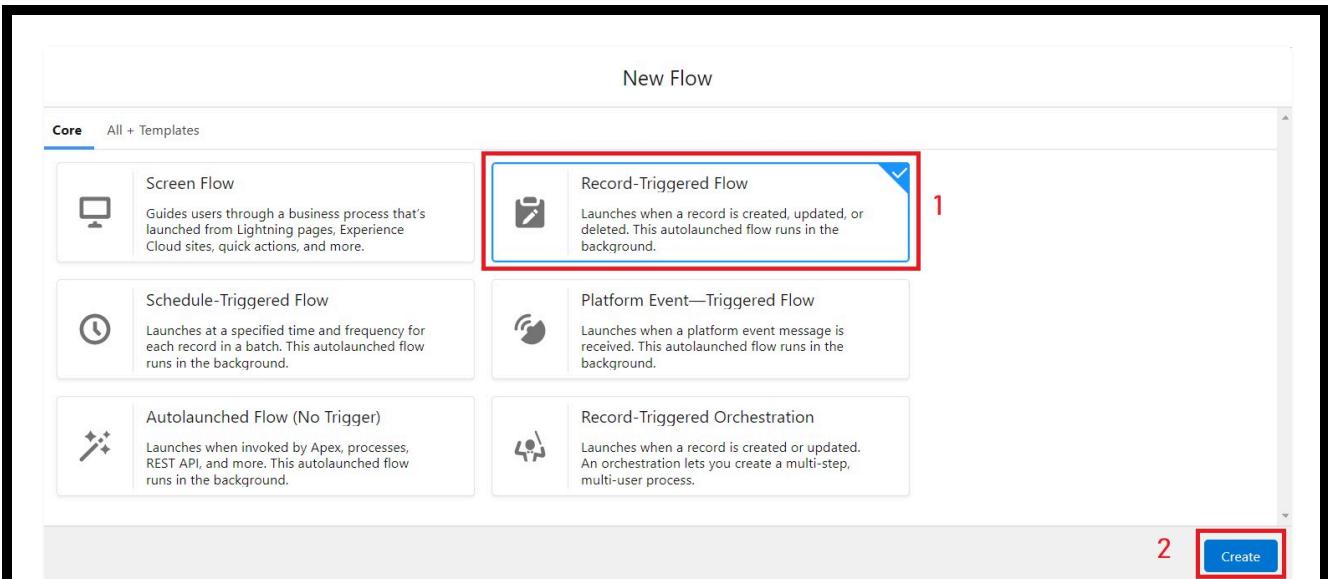
Activity 1 - Create a Flow

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Process Automation', the 'Flows' item is selected and highlighted with a red box, labeled '2'. In the main content area, the search bar at the top contains 'flows' and is also highlighted with a red box, labeled '1'. On the right, the 'Flows' page is displayed with a table of flow definitions. A red box highlights the 'New Flow' button in the top right corner of the page, labeled '3'.

Flow Label	Process Type	Ac...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Veera Venkata Varaprasad Androthu	07/06/2023, 11:35 am	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

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

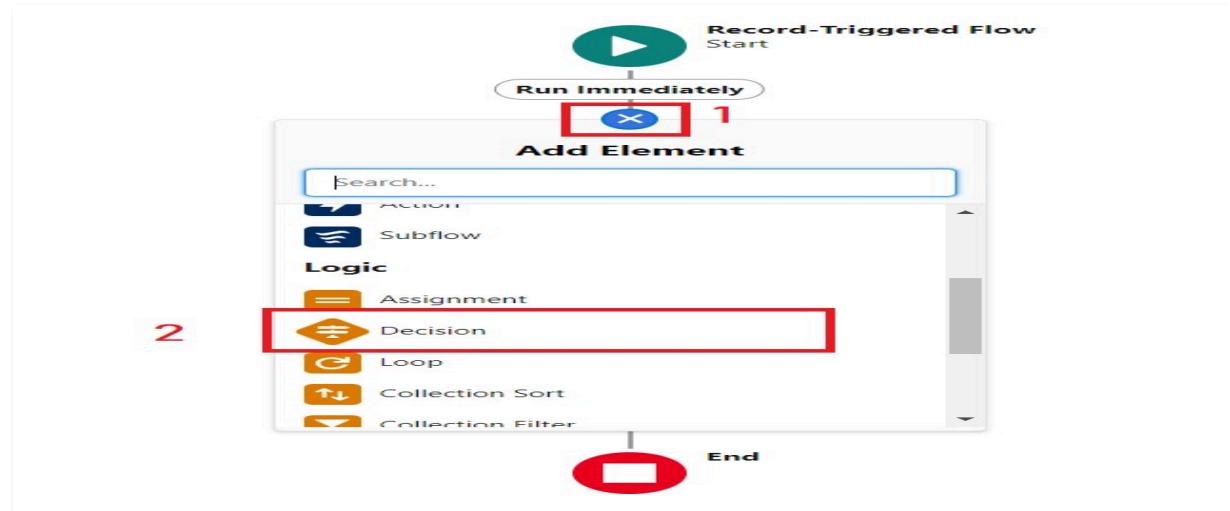


3. Select the Object as a Room Booking in the Drop down list.

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.

New Decision

* Label Field Should be Update	* 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 4	OUTCOME DETAILS 2						
Single Sharing 3	* Label Single Sharing * Outcome API Name Single_Sharing						
Condition Requirements to Execute Outcome All Conditions Are Met (AND) 3							
<table border="1"><tr><td>Resource \$Record > Room sharing</td><td>Operator Equals</td><td>Value single sharing</td></tr><tr><td>Resource \$Record > AC - 3000</td><td>Operator Equals</td><td>Value False</td></tr></table>		Resource \$Record > Room sharing	Operator Equals	Value single sharing	Resource \$Record > AC - 3000	Operator Equals	Value False
Resource \$Record > Room sharing	Operator Equals	Value single sharing					
Resource \$Record > AC - 3000	Operator Equals	Value False					
+ Add Condition							
Cancel Done							

9.Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.

•Resource: Select Record.Room sharing.

•Operator: Select Equals.

•Value: Select Double sharing.

•Click on "Add Condition"

•Resource: Select Record.AC-3000.

•Operator: Select Equals.

•Value: Select False.

•Click on "+" Symbol In the Outcome Order.

The screenshot shows the 'OUTCOME DETAILS' section for an outcome named 'Double sharing'. The 'Label' field contains 'Double sharing' and the 'Outcome API Name' field contains 'Double_sharing'. A dropdown menu under 'Condition Requirements to Execute Outcome' is set to 'All Conditions Are Met (AND)'. Below this, two conditions are defined:

- Condition 1: Resource '\$Record > Room sharing' Equals 'Double sharing'.
- Condition 2: AND Condition '\$Record > AC - 3000' Equals 'False'.

Numbered annotations are present: '1' points to the 'Label' field, '2' points to the condition requirements dropdown, and '3' points to the '+' button in the 'OUTCOME ORDER' sidebar.

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

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

The screenshot shows the 'OUTCOME DETAILS' section for an outcome named 'Triple Sharing'. The 'Label' field contains 'Triple Sharing' and the 'Outcome API Name' field contains 'Triple_Sharing'. A dropdown menu under 'Condition Requirements to Execute Outcome' is set to 'All Conditions Are Met (AND)'. Below this, two conditions are defined:

- Condition 1: Resource '\$Record > Room sharing' Equals 'Triple sharing'.
- Condition 2: AND Condition '\$Record > AC - 3000' Equals 'False'.

Numbered annotations are present: '1' points to the 'Label' field, '2' points to the condition requirements dropdown, and '3' points to the '+' button in the 'OUTCOME ORDER' sidebar.

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.

OUTCOME ORDER 1 + 3

OUTCOME DETAILS

1 *Label Single Ac *Outcome API Name Single_Ac

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

2 Resource \$Record > Room sharing Equals Value single sharing
Resource AND \$Record > AC - 3000 Equals Value !{\$GlobalConstant.True}

Delete Outcome

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.

OUTCOME ORDER 1 + 3

OUTCOME DETAILS

1 *Label Double Ac *Outcome API Name Double_Ac

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

2 Resource \$Record > Room sharing Equals Value Double sharing
Resource AND \$Record > AC - 3000 Equals Value !{\$GlobalConstant.True}

Delete Outcome

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										
<input style="border: none; border-radius: 50%; width: 15px; height: 15px; vertical-align: middle; margin-right: 5px;" type="button" value="+"/> Single Sharing Double sharing Triple Sharing Single Ac Double Ac Triple Ac Default Outcome	1 *Label <input type="text" value="Triple Ac"/> *Outcome API Name <input type="text" value="Triple_Ac"/> Condition Requirements to Execute Outcome All Conditions Are Met (AND) <input style="border: none; border-radius: 50%; width: 15px; height: 15px; vertical-align: middle; margin-left: 10px;" type="button" value="+"/> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Resource <input type="text" value="\$Record > Room sharing"/></td> <td style="width: 10%;">Operator <input type="text" value="Equals"/></td> <td style="width: 60%;">Value <input type="text" value="Triple sharing"/></td> </tr> <tr> <td colspan="2">AND <input type="text" value="(\$Record > AC - 3000)"/></td> <td>Operator <input type="text" value="Equals"/></td> </tr> <tr> <td colspan="2"></td> <td>Value <input type="text" value="True"/></td> </tr> </table> <input style="border: none; border-radius: 5px; width: 150px; margin-top: 10px;" type="button" value="+ Add Condition"/>	Resource <input type="text" value="\$Record > Room sharing"/>	Operator <input type="text" value="Equals"/>	Value <input type="text" value="Triple sharing"/>	AND <input type="text" value="(\$Record > AC - 3000)"/>		Operator <input type="text" value="Equals"/>			Value <input type="text" value="True"/>	<input style="border: none; border-radius: 5px; background-color: #f0f0f0; padding: 2px 10px; margin-bottom: 5px;" type="button" value="Delete Outcome"/> <input style="border: none; border-radius: 5px; background-color: #f0f0f0; padding: 2px 10px; margin-right: 10px;" type="button" value="Cancel"/> 3 <input style="border: 2px solid red; border-radius: 5px; background-color: #0070C0; color: white; padding: 2px 10px;" type="button" value="Done"/>
Resource <input type="text" value="\$Record > Room sharing"/>	Operator <input type="text" value="Equals"/>	Value <input type="text" value="Triple sharing"/>									
AND <input type="text" value="(\$Record > AC - 3000)"/>		Operator <input type="text" value="Equals"/>									
		Value <input type="text" value="True"/>									

When to Execute Outcome

If the condition requirements are met
 Only if the record that triggered the flow to run is updated to meet the condition requirements

Flow Diagram:

```

graph TD
    Start((Record-Triggered Flow)) --> Run[Run Immediately]
    Start --> Decision{Field Should be Update Decision}
    Run --> Decision
    Decision --> SingleSharing([Single Sharing])
    Decision --> DoubleSharing([Double sharing])
    Decision --> TripleSharing([Triple Sharing])
    Decision --> SingleAc([Single Ac])
    Decision --> DoubleAc([Double Ac])
    Decision --> TripleAc([Triple Ac])
    Decision --> Default([Default Outcome])
    SingleSharing --> End([End])
    DoubleSharing --> End
    TripleSharing --> End
    SingleAc --> End
    DoubleAc --> End
    TripleAc --> End
    Default --> End
  
```

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

15. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label single	* API Name single
Description	

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

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

Info 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.

Page No : 77

Edit Update Records

Update Salesforce records using values from the flow.

* Label	* API Name
Double	Double

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

Info 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

*** 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

Info 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

*** 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	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
single ac1	single_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

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	34000

+ Add Field

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

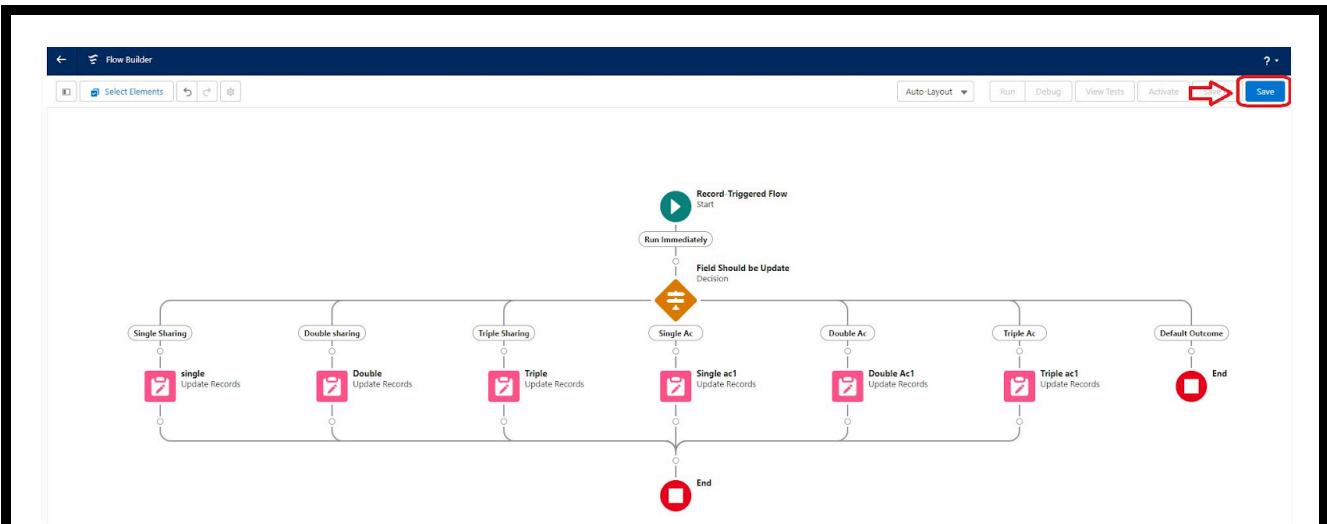


+ Add Field

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
Update Amount Field

* Flow API Name
Update_Amount_Field

Description

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	

Buttons: Cancel, Save & New, Save

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

Room Booking
RN-008

Related	Details
Room No	AC - 3000
Name	Prasad
Room sharing	Double sharing - 12000
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
Amount	
₹30,000	

By process mentioned above, A CRM Application to Manage the Booking of Co-Living had finished .

Thank you