

A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING



**CO.LIVING
HOSTEL**

NAME : ASAPU PYDI RAJU

E-MAIL: rajuasapu123@gmail.com

PROJECT ABSTRACT:

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

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

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TASK 1-SALESFORCE

Introduction

Introduction:

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

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

What Is Salesforce?

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

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

ACTIVITY 1:

Creating Developer Account

Creating a developer org in salesforce.

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

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

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

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

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

First Name* Last Name*

Email*

Role*

Company*

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

Username : should be a combination of your name and company

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

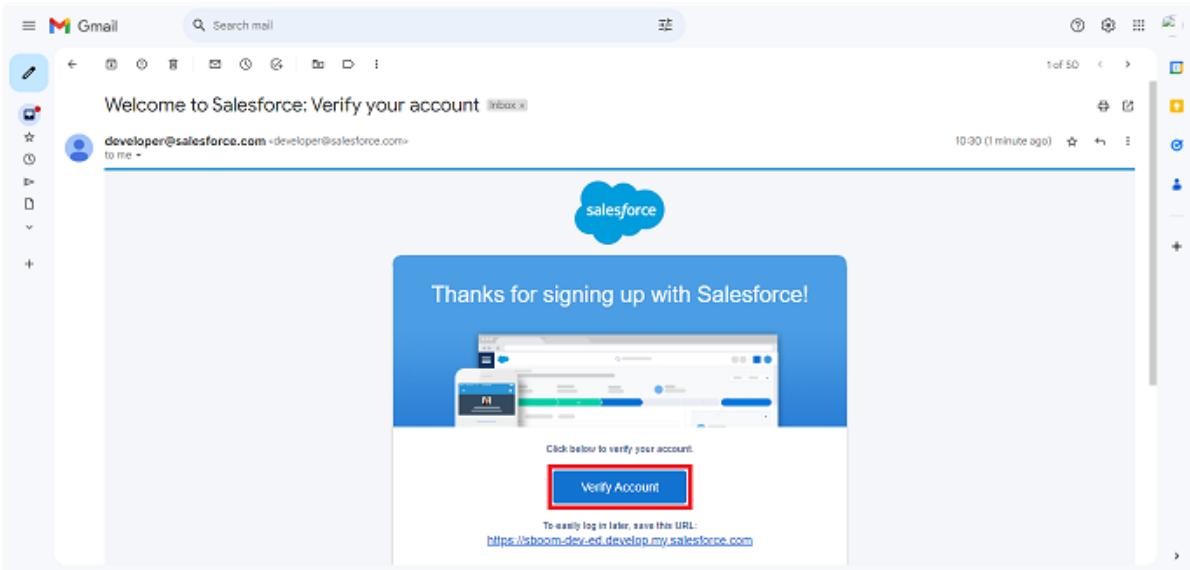
username@organization.com

Click on sign me up after filling these.

ACTIVITY 2 :

Account Activation

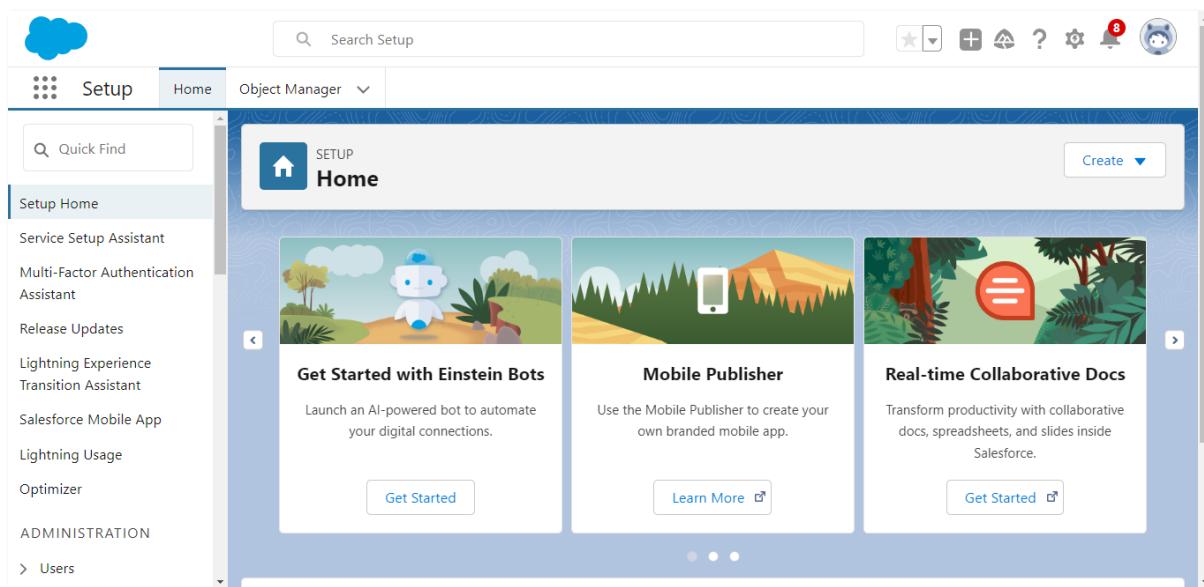
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

The screenshot shows the "Change Your Password" page. The title is "Change Your Password". The instructions say "Enter a new password for lead@sb.com. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number". A red box highlights the password fields. The "New Password" field contains "....." and is labeled "Good". The "Confirm New Password" field contains "....." and is labeled "Match". Below these are "Security Question" and "Answer" fields. The "Answer" field contains "asdfghjkl". A large red box highlights the "Change Password" button at the bottom.

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



TASK 2-OBJECT

What Is an Object?

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

Salesforce objects are of two types:

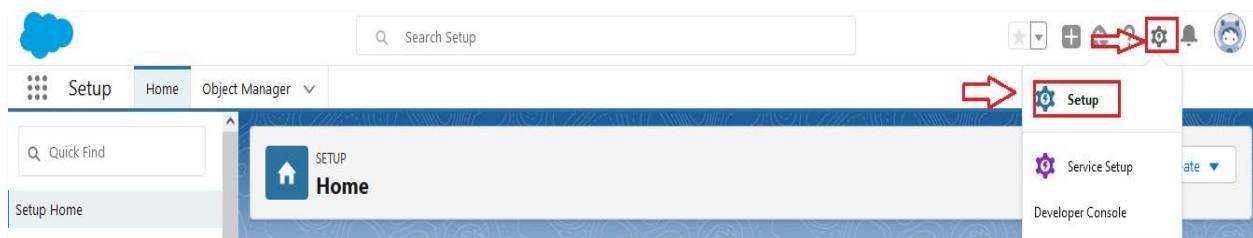
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

ACTIVITY 1:

Create a custom object for Total Rooms

To create a custom object, follow these steps:

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



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

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, name layouts, and reports.

Label	Total Room	Example: Account
Plural Label	Total Rooms	Example: Accounts

Starts with vowel sound

The Object Name is used when referencing the object via the API.

Object Name	Total_Rooms	Example: Account
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Description

Context Sensitive Help Setting

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name

None

Enter Record Name Label and Format

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

Record Name	Total No Of Rooms	Example: Account Name
Data Type	Text	

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification

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

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

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

- Allow Search

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

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

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

ACTIVITY 2:

Create a custom object for Customer

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Customer1".
4. Fill in the plural label as "Customers".
5. Record name: "Customer Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
11. Leave everything else as is, and click Save.

ACTIVITY 3:

Create a custom object for Room Booking

To create a custom object, follow these steps:

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

ACTIVITY 4:

Create a custom object for Payment

To create a custom object, follow these steps:

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

ACTIVITY 5:

Create a custom object for Food Selection

To create a custom object, follow these steps:

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

ACTIVITY 6:

Create a custom object for Feedback

To create a custom object, follow these steps:

1. From setup click on object manager.

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

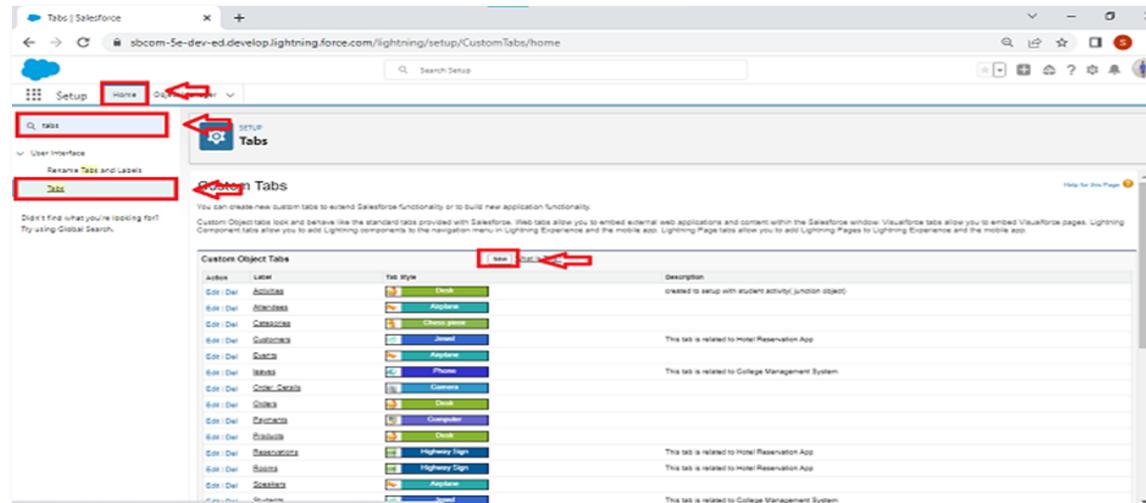
TASK 3-TAB

ACTIVITY 1:

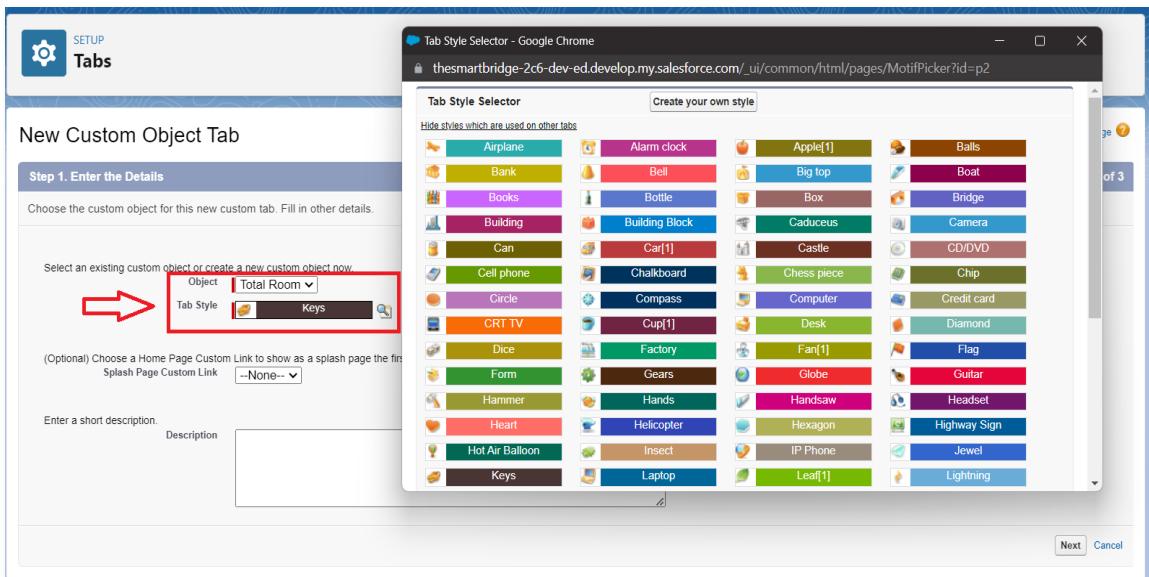
Creating a Tab for Total Rooms

To create a Tab:(Total Rooms)

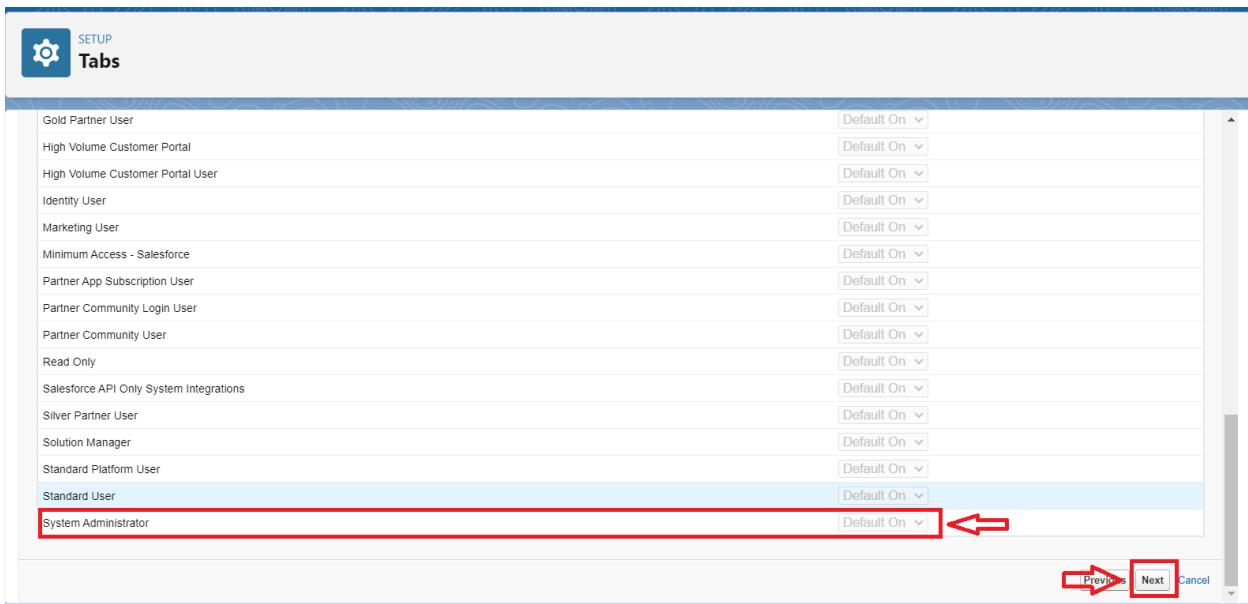
1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)



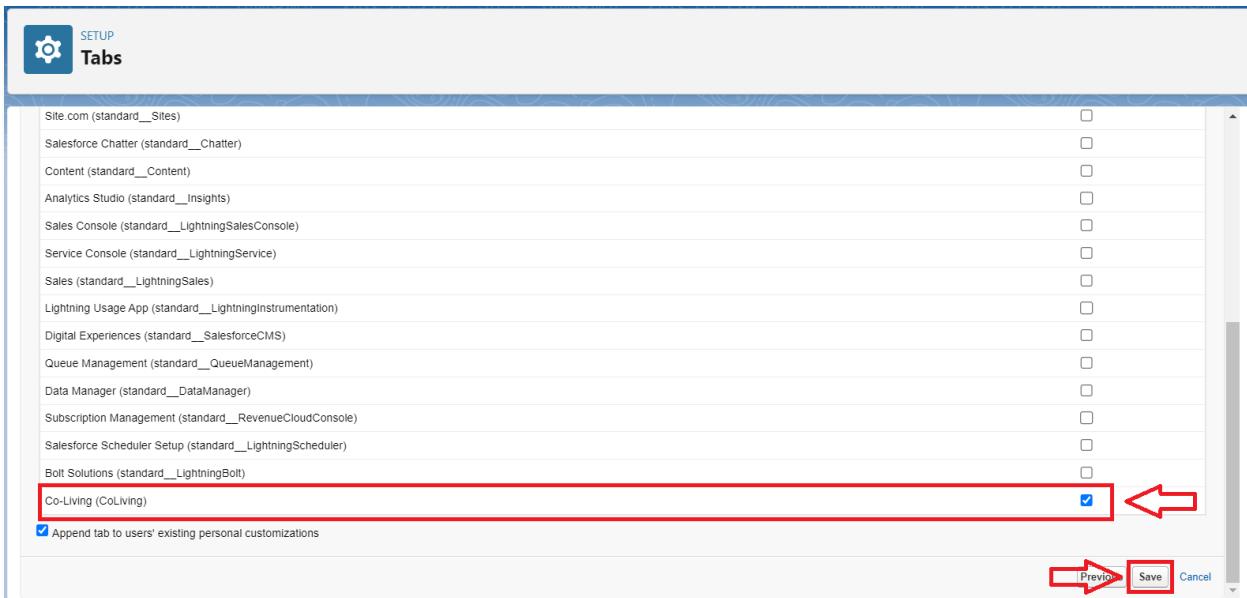
2. Select Object(Total Rooms) > Select the tab style.



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



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



ACTIVITY 2:

Create a Tab for Customers

To create a Tab:(Customers)

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

ACTIVITY 3:

To create a Tab for Room Bookings

To create a Tab:(Room Bookings)

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

ACTIVITY 4:

Create a Tabs For Remaining Objects

Now create the tabs for Payments, Food Selections, Feedbacks Objects.

TASK 4-THE LIGHTNING APP

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

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

ACTIVITY 1:

Create A Lightning App

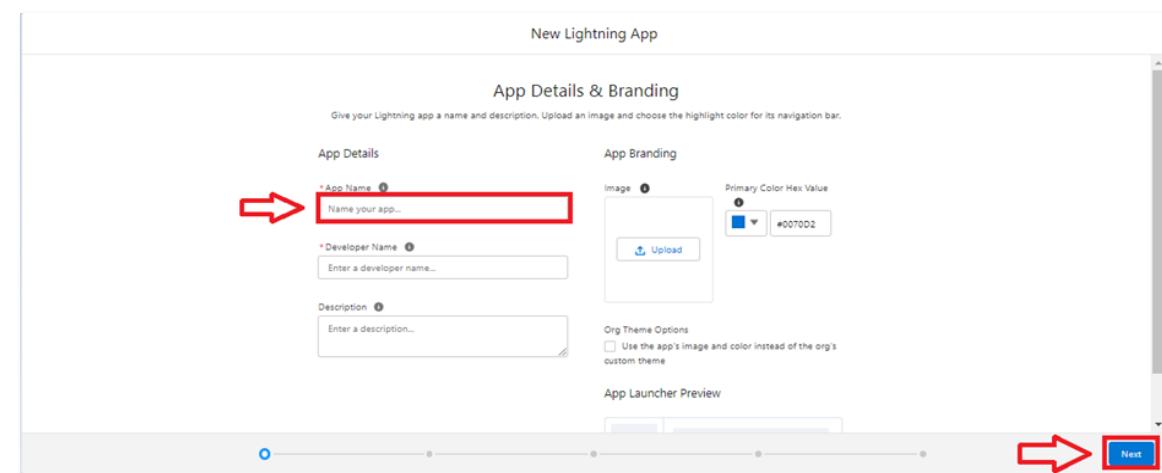
To create a lightning app page:

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

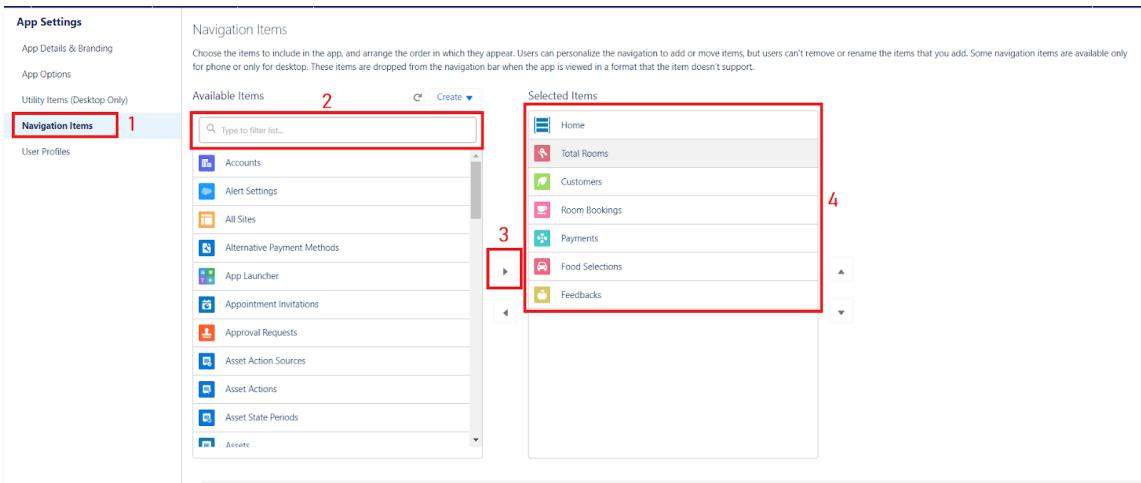
The screenshot shows the Salesforce App Manager interface. At the top, there are two red boxes: one around the 'App Manager' search term in the quick find bar, and another around the 'App Manager' link in the sidebar. A red arrow points from the sidebar link to the main content area. Another red arrow points to the 'New Lightning App' button at the top right of the page. The main content area displays a table of existing apps, with the first few rows listed below:

App Name	Developer Name	Description	Last Modified	Type
All Tabs	ApfTabSet	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	Discover and manage business solutions designed for your industry	04/12/2022, 10:13 am	Classic
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	04/12/2022, 10:18 am	Lightning
Charter Desktop	Charter/Desktop	Charter Desktop is an Adobe AIR-based desktop application that lets Charter users stay connected to their accounts and contacts on the go. Use it to view fe...	29/12/2022, 4:04 pm	Connected (Varaged)
Charter Mobile for BlackBerry	CharterForBlackBerry	The Salesforce.com Charter Mobile app lets you access Charter data on the go. Use it to view fe...	29/12/2022, 4:05 pm	Connected (Varaged)
College Management System	Naresh	demo app	08/12/2022, 4:19 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 records.	04/12/2022, 10:13 am	Lightning

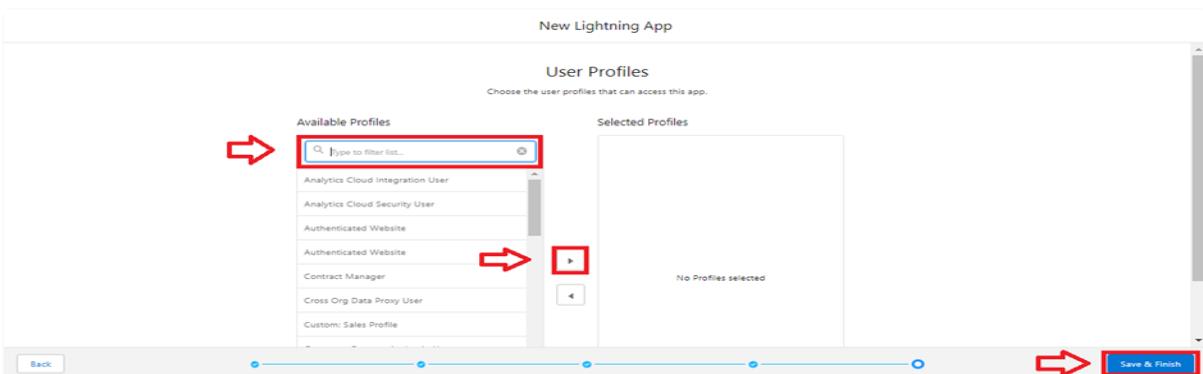
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



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



4. To Add User Profiles:



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

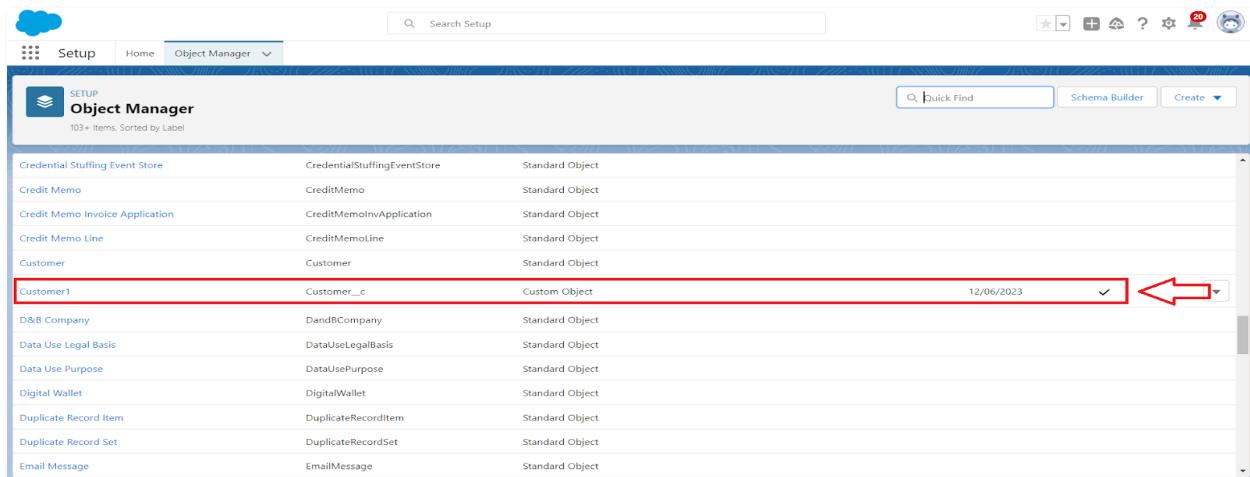
TASK 5-FIELDS & RELATIONSHIPS

ACTIVITY 1:

Creation of fields for the customer1 object

1. To create fields in an object:

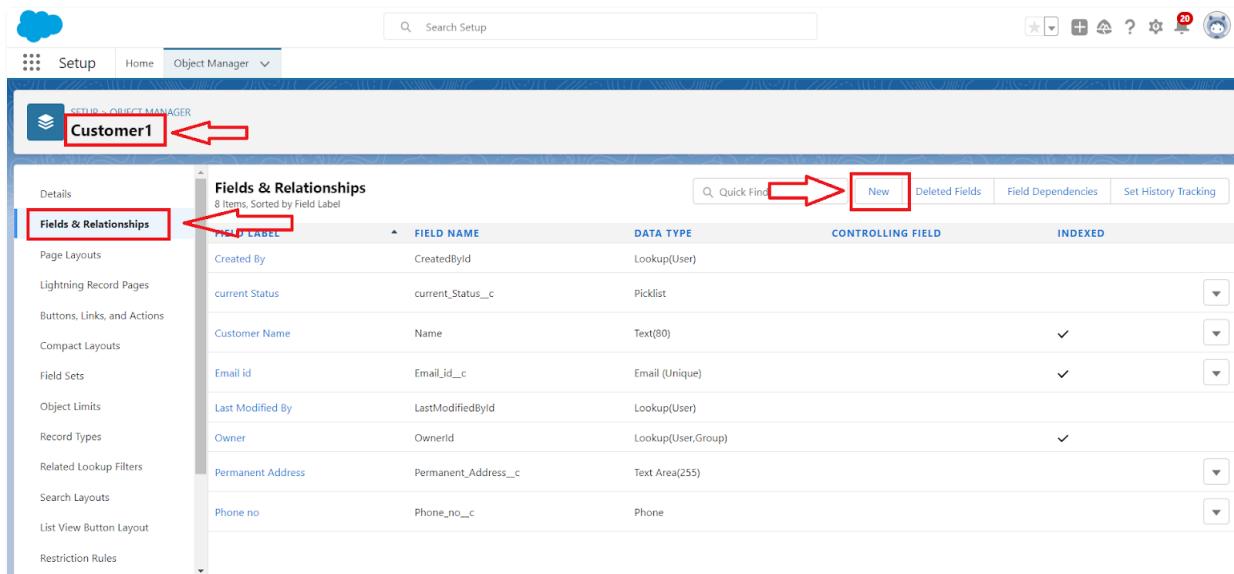
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays a list of objects with columns for Name, Label, and Type. The 'Customer1' object is highlighted with a red box and has a red arrow pointing to its creation date field ('Created Date').

Name	Label	Type	Created Date
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	Customer1_c	Custom Object	12/06/2023
D&B Company	DandBCompany	Standard Object	
Data Use Legal Basis	DataUseLegalBasis	Standard Object	
Data Use Purpose	DataUsePurpose	Standard Object	
Digital Wallet	DigitalWallet	Standard Object	
Duplicate Record Item	DuplicateRecordItem	Standard Object	
Duplicate Record Set	DuplicateRecordSet	Standard Object	
Email Message	EmailMessage	Standard Object	

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



The screenshot shows the 'Fields & Relationships' page for the 'Customer1' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup categories. The main area shows a table of existing fields with columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. A red box highlights the 'Customer1' object in the title bar, another highlights the 'Fields & Relationships' tab in the sidebar, and a third highlights the 'New' button in the top right of the table area.

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"

Setup > OBJECT MANAGER Customer1

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

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 location. 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.

Phone 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. Click on next

Setup > OBJECT MANAGER Customer1

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

Edit Customer Custom Field Phone no

Custom Field Definition Edit

Field information

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

General Options

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

Default Value:

Use formula editor: Enclose text and picklist value API names in double quotes. ("Phone_no") include numbers without quotes (2), show percentages as decimals (0.10), and express date calculations in the standard format: (Today) + 1. To reference a field from a custom Metadata type record use: \$CustomMetadata[Phone_no].RecordName[Field]

Change Field Type Save Cancel

5. Fill the Above as following:

1. Field Label: Phone no
2. Field Name : gets auto generated
3. Click on Next > Next > Save and new.

2. To create another fields in an object:

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

- Click on Next > Next > Save and new.

3. To create another fields in an object:

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

4. To create another fields in an object:

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

ACTIVITY 2:

Creation of fields for the Room Booking object

1. To create fields in an object:

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

Setup Object Manager 153+ Items. Sorted by Label

Object Name	Label	Type	Last Modified
Room Booking	Room_Booking__c	Custom Object	07/06/2023
Scorecard	Scorecard	Standard Object	
Scorecard Association	ScorecardAssociation	Standard Object	
Scorecard Metric	ScorecardMetric	Standard Object	
Seller	Seller	Standard Object	
Service Appointment	ServiceAppointment	Standard Object	

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

Setup > Object Manager Room Booking

Fields & Relationships

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

3. Select Data Type as a “Picklist”

Setup > Object Manager Room Booking

Fields & Relationships

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

4. Click on Next

SETUP > OBJECT MANAGER
Room Booking

Step 2. Enter the details

Field Label: Room Sharing [1]

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

Display values alphabetically, not in the order entered
 Use first value as default value
 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 type: Add this field to existing custom report types that contain this entry [1]

Default Value: Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: '(the_text)', include numbers without quotes (2), show percentages as decimal (3), and express date calculations in the standard format (Today + 1). To reference a field from a Custom Metadata type record use \$CustomMetadata_Type__Name\$ and replace \$Name\$ with the field name.

5. Fill the Above as following:

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

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

To create fields & relationship to an object:

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

Setup Home Object Manager

Object Manager

152+ items. Sorted by Label

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
Scorecard	Scorecard	Standard Object
Scorecard Association	ScorecardAssociation	Standard Object
Scorecard Metric	ScorecardMetric	Standard Object
Seller	Seller	Standard Object
Service Appointment	ServiceAppointment	Standard Object

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

Setup > OBJECT MANAGER
Room Booking

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AC - 3000	AC_c	Checkbox		
Advance payment for 1month	Advance_payment_for_1month_c	Checkbox		
Amount	Amount_c	Currency(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(Customer1)		
Room No	Name	Auto Number		

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

4. Click on Next

Setup > OBJECT MANAGER
Room Booking

Fields & Relationships

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

Data Type

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

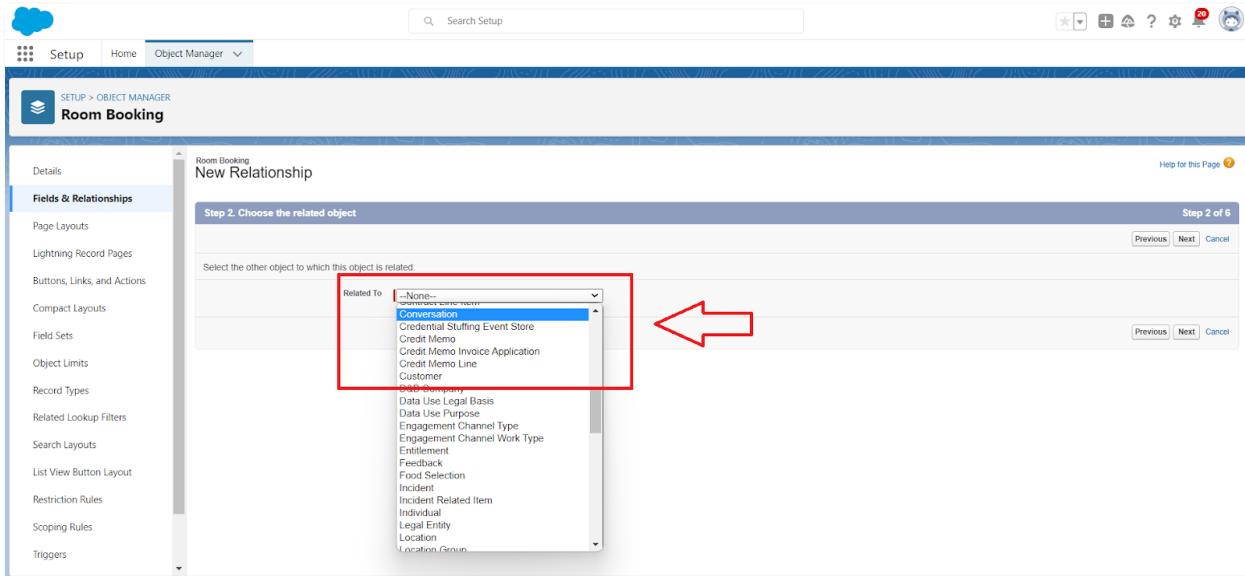
Master-Detail Relationship

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

- The master record is listed on all detail records.
- The ownership and change 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.

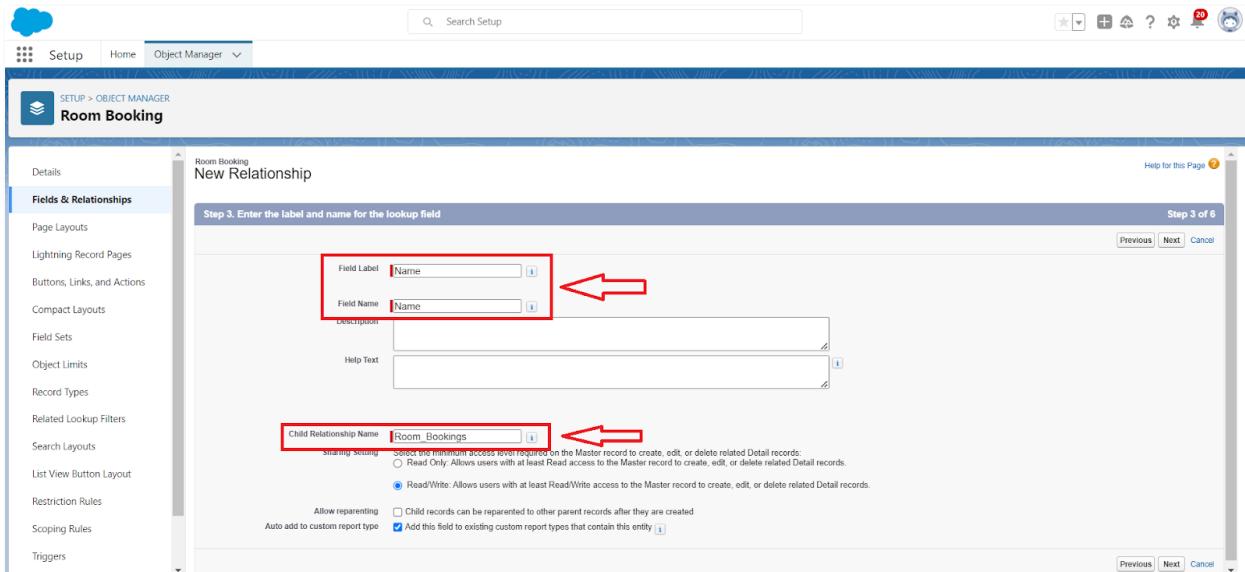
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

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



6. Fill the Above as following:

- Change the Field Label: Name
- Field Name : It's gets auto generated



- Click on Next > Next > Save and new.

3. To create fields in an object:

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

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

4. To create fields in an object:

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

5. To create fields in an object:

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

6. To Create a Fields & Relationship to an Object

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Rooms” object and click on Next
 - Fill the Above as following:

- Change the Field Label: Total No Of Rooms
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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

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

Total Room
New Custom Field

Step 3. Define the summary calculation

Select Object to Summarize

Master Object: Total Room
Summarized Object: Room Bookings

Select Roll-Up Type

COUNT SUM MIN MAX

Field to Aggregate: None

Filter Criteria

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

Step 3 of 5

Previous | Next | Cancel

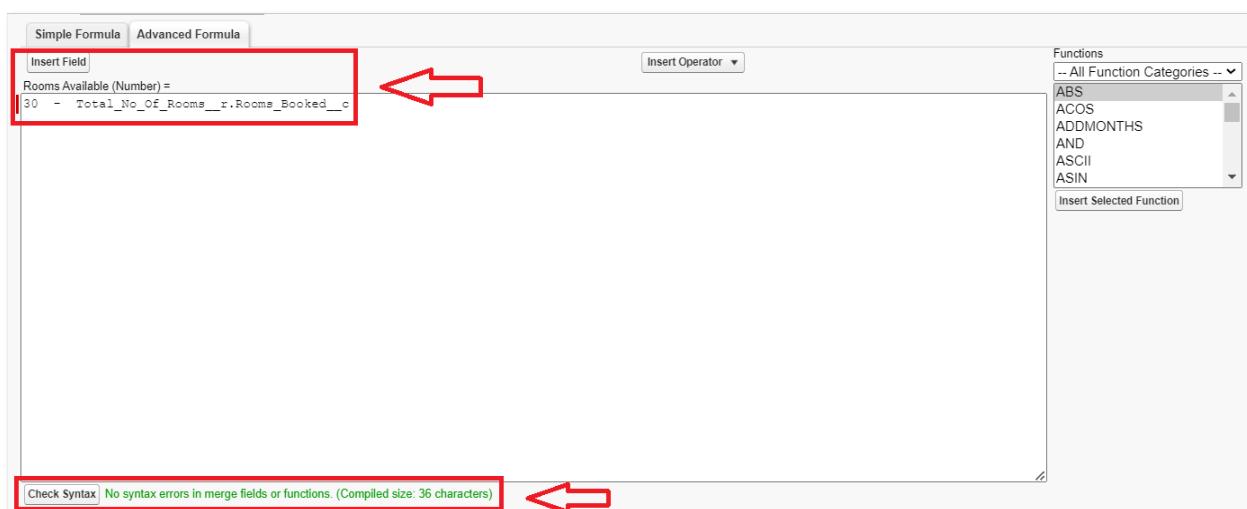
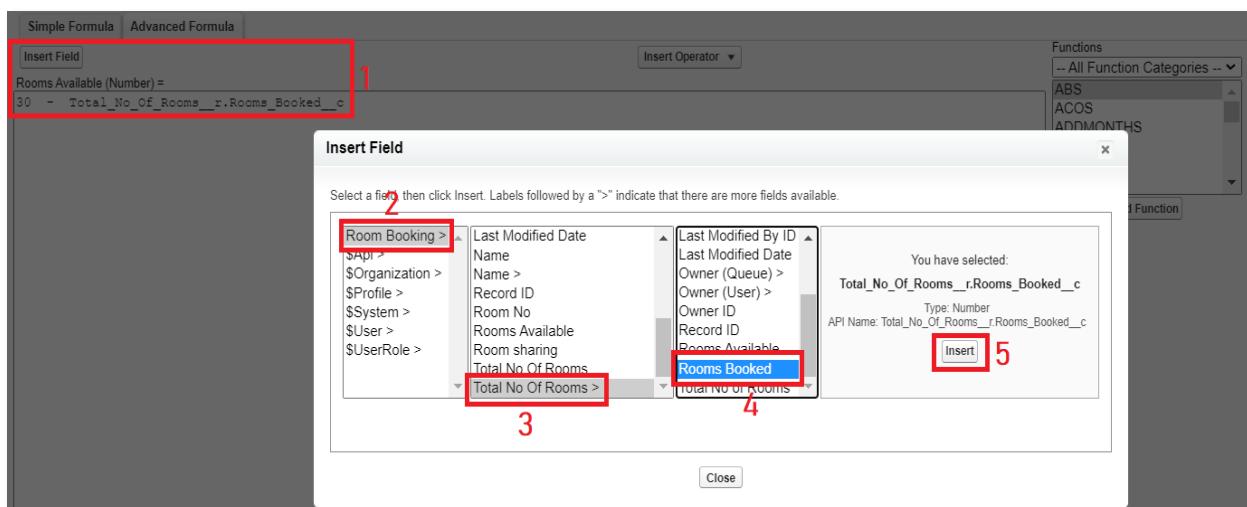
7. Click on Next > Next > Save and new

8. To create fields in an object:

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

4. Fill the Above as following:

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



- Click on Next > Next > Save and new.

9. To create fields in an object:

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

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

10. To create fields in an object:

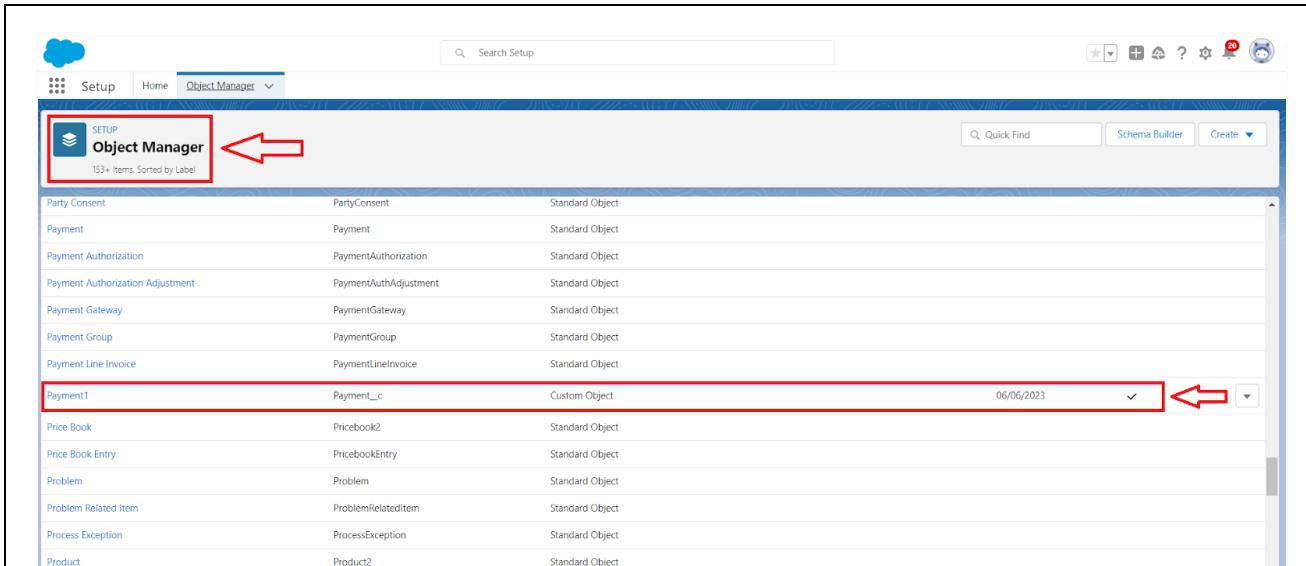
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Check Out
 - Field Name :It's gets auto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

ACTIVITY 3:

Creation of Fields & Relationship for Payment1 Object

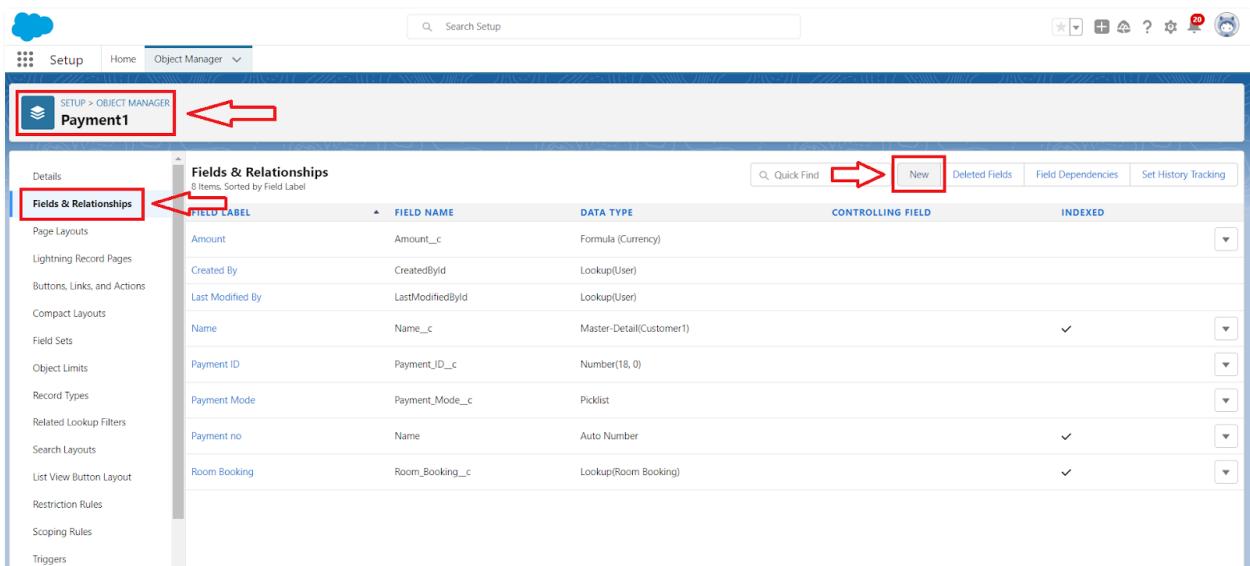
1. To create fields & relationship to an object:

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



Party Consent	PartyConsent	Standard Object
Payment	Payment	Standard Object
Payment Authorization	PaymentAuthorization	Standard Object
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object
Payment Gateway	PaymentGateway	Standard Object
Payment Group	PaymentGroup	Standard Object
Payment Line Invoice	PaymentLineInvoice	Standard Object
Payment1	Payment__c	Custom Object
Price Book	Pricebook2	Standard Object
Price Book Entry	PricebookEntry	Standard Object
Problem	Problem	Standard Object
Problem Related Item	ProblemRelatedItem	Standard Object
Process Exception	ProcessException	Standard Object
Product	Product2	Standard Object

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



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		
Room Booking	Room_Booking__c	Lookup(Room Booking)		

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

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

Data Type

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date

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 pop-up list. The other object is the source of the values in the list.

- The relationship field requires all detail records.
- The relationship and ordering of detail records are determined by the master record.
- When a user deletes a master record, all detail records are deleted.
- You can create rollup summary fields on the master records to summarize the detail records.

Help for this Page

4. Click on Next

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

SETUP > OBJECT MANAGER
Payment1

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related to: **-None-**

- Credit Memo Line
- Customer
- D&B Company
- Data Use Legal Basis
- Engagement Channel Type
- Engagement Channel Work Type
- Entitlement
- Feedback
- Food Selection
- Incident
- Incident Related Item

Help for this Page

SETUP > OBJECT MANAGER
Payment1

New Relationship

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

Field Label: **Name**

Field Name: **Name**

Description:

Help Text:

Child Relationship Name: **Payments1**

Sharing Settings: Set 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

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

Help for this Page

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

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

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

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

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)		
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		
Room Booking	Room_Booking__c	Lookup(Room Booking)		

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

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

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

Data Type

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date

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

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

SETUP > OBJECT MANAGER
Payment1

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: Room Booking

Step 2

SETUP > OBJECT MANAGER
Payment1

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

Step 3 of 6

Field Label: Room Booking

Field Name: Room_Booking

Child Relationship Name: Payments1

What to do if the lookup record is deleted?

- Clear the value of this field. You can't choose this option if you make this field required.
- Don't allow deletion of the lookup record that's part of a lookup relationship.

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

Lookup Filter

Optional: create a filter to limit the records available to users in the lookup field. Tell me more! Show Filter Settings

6. Fill the Above as following:

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

3. Creation of another fields for the Payment1 object

To create fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area is titled 'Object Manager' with a subtitle '153+ items, Sorted by Label'. A search bar at the top right contains 'Quick Find' and 'Schema Builder' buttons. Below the search bar is a 'Create' button. The main list displays various objects with their names, API names, and object types. The 'Payment1' object is highlighted with a red box and has its details shown in the bottom right corner: 'Payment__c' as the API name, 'Custom Object' as the object type, and a creation date of '06/06/2023'. A red arrow points to the dropdown menu next to the creation date.

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

The screenshot shows the 'Fields & Relationships' page for the 'Payment1' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area is titled 'Fields & Relationships' with a subtitle '8 Items, Sorted by Field Label'. A search bar at the top right contains 'Quick Find' and 'New' buttons. To the right of the search bar are 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' buttons. On the left, a sidebar lists various object settings like 'Page Layouts', 'Lightning Record Pages', etc. The main table lists eight fields with columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The 'FIELD LABEL' column is highlighted with a red box. A red arrow points to the 'New' button in the top right of the table header. Another red arrow points to the 'FIELD LABEL' column header.

3. Select Data Type as a “Picklist”

The top screenshot shows the 'Fields & Relationships' section of the Object Manager for 'Payment1'. A red box highlights the 'Fields & Relationships' tab in the sidebar, and another red box highlights the 'Picklist' option in the list of field types.

The bottom screenshot shows the configuration page for the 'Payment_Mode' field. A red box highlights the 'Field Label' input field containing 'Payment Mode'. Another red box highlights the 'Values' input field, which contains a list of payment modes separated by new lines: 'Cash', 'Check', 'Credit card', 'Debit card', 'UPI', 'Phonepe'.

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:

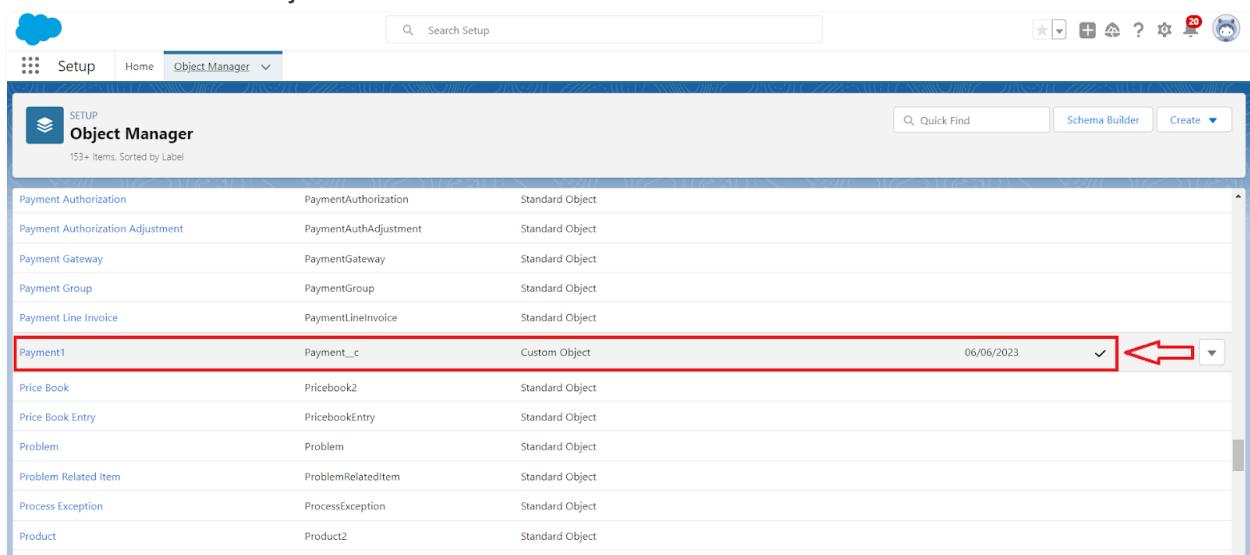
In Salesforce, a cross-object formula field allows you to create a formula that references fields from related objects. It enables you to perform calculations or display data from related records without the need for custom code or complex workflows.

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. At the top, there's a navigation bar with 'SETUP', 'Home', and 'Object Manager'. Below it is a search bar and various icons. The main area is titled 'Object Manager' and shows a list of objects. The 'Payment1' object is highlighted with a red border and has a red arrow pointing to its dropdown menu. Other objects listed include 'Payment Authorization', 'Payment Authorization Adjustment', 'Payment Gateway', 'Payment Group', 'Payment Line Invoice', 'Price Book', 'Price Book Entry', 'Problem', 'Problem Related Item', 'Process Exception', and 'Product'.

Object Name	Object Label	Type
Payment Authorization	PaymentAuthorization	Standard Object
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object
Payment Gateway	PaymentGateway	Standard Object
Payment Group	PaymentGroup	Standard Object
Payment Line Invoice	PaymentLineInvoice	Standard Object
Payment1	Payment__c	Custom Object
Price Book	Pricebook2	Standard Object
Price Book Entry	PricebookEntry	Standard Object
Problem	Problem	Standard Object
Problem Related Item	ProblemRelateditem	Standard Object
Process Exception	ProcessException	Standard Object
Product	Product2	Standard Object

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

SETUP > OBJECT MANAGER
Payment1

Details

Fields & Relationships

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer1)	✓	
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number	✓	
Room Booking	Room_Booking__c	Lookup(Room Booking)	✓	

3. Select Data Type as a “Formula”

4. Click on Next

SETUP > OBJECT MANAGER
Payment1

Details

Fields & Relationships

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

Data Type

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

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

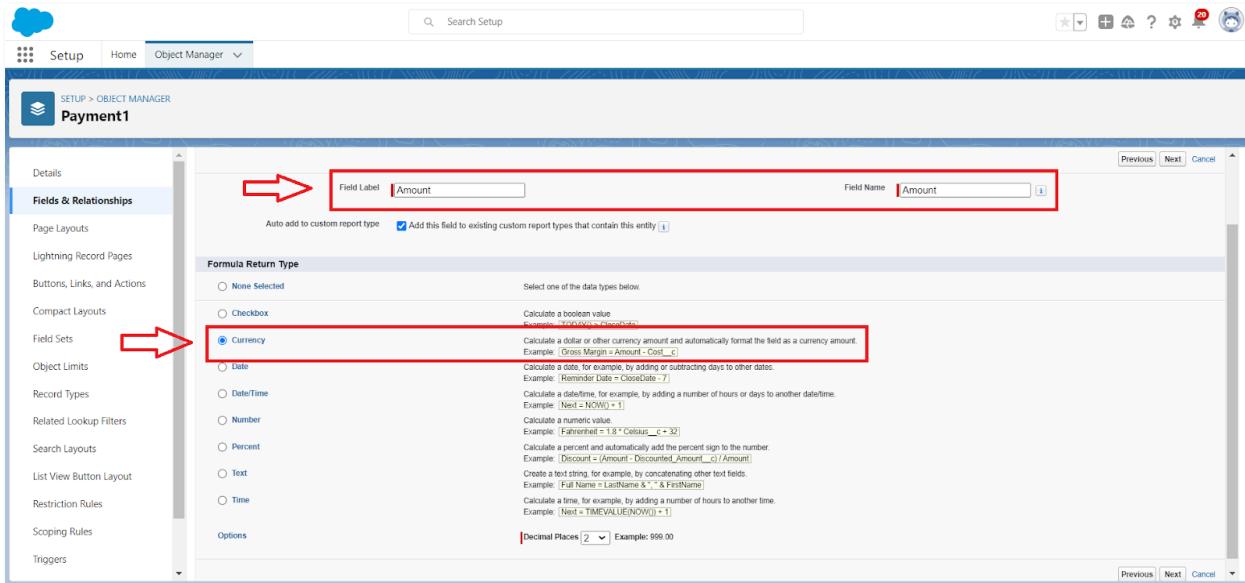
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

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

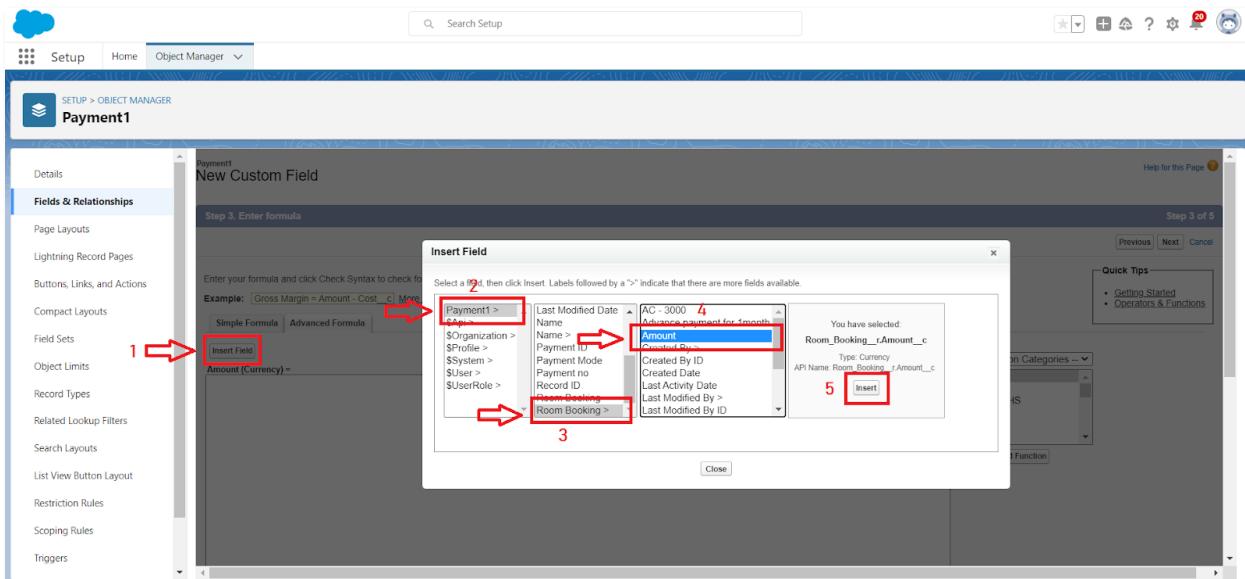
- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail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

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

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



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



Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Gross Margin = Amount - Cost More Examples

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

Amount (Currency) = **Amount**(**Activity__c**)

Check syntax: No syntax errors in merge fields or functions. (Compiled size: 31 characters)

Description Help Text

Blank Field Handling

If your formula references any number, currency, or percent fields, specify what happens to the formula output when their values are blank.

Treat blank fields as zeros Treat blank fields as spaces

7. Click on the Check syntax: No syntax errors in merge fields

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

ACTIVITY 4:

Creation of fields for the Food Selection object

1. To create fields & relationship to an object:

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

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

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

SETUP > OBJECT MANAGER
Food Selection

Fields & Relationships

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

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

4. Click on Next

SETUP > OBJECT MANAGER
Food Selection

Data Type

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email

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

The top screenshot shows the 'Step 3. Enter the label and name for the lookup field' page for the 'Food Selection' object. It includes fields for 'Field Label' (set to 'Name'), 'Field Name' (auto-generated), 'Description', 'Help Text', and 'Sharing Setting' (set to 'Read/Write'). A red box highlights the 'Field Label' and 'Field Name' fields, with a red arrow pointing to the 'Field Label' field.

The bottom screenshot shows the 'Step 2. Choose the related object' page for creating a new relationship. It lists various objects like Change Request, Communication Subscription, and Contact. A red box highlights the dropdown menu under 'Select the other object to which this object is related', with a red arrow pointing to the 'Customer' option.

6. Fill the Above as following:

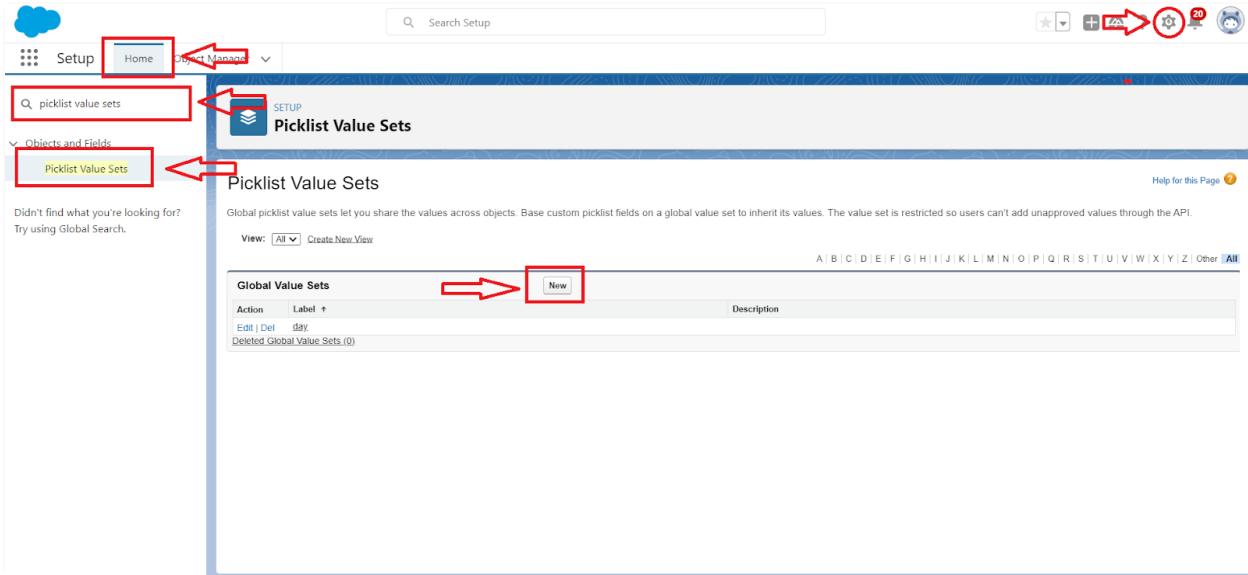
- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

Picklist value sets:

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

Create a picklist value set:

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



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

The screenshot shows the 'Global Value Set Edit' screen. The 'Label' field contains 'Custom Picklist values' and the 'Name' field contains 'Custom_Picklist_values'. The 'Values' section lists days of the week: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday. A red arrow points to the 'Values' input area. Below the values, there are two checkboxes: 'Display values alphabetically, not in the order entered' (unchecked) and 'Use first value as default value' (checked). Red arrows point to both of these checkboxes. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

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 'Object Manager' screen with 103+ items. The 'Food Selection' object is highlighted with a red box and a red arrow points to the dropdown menu next to the last column of its row.

Object Name	API Name	Type	Last Modified
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

Food Selection

Fields & Relationships

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

3. Select Data Type as a “Picklist”

Food Selection

Fields & Relationships

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

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

SETUP > OBJECT MANAGER
Food Selection

View CUSTOM FIELD

Step 2 of 4

Field Label: Breakfast

Values: Use global picklist value set
 Enter values, with each value separated by a new line
 None
 Custom Picklist values

Field Name: Breakfast

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 entity

Default Value: Show Formula Editor

4. Fill the Above as following:

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

3. Create a another picklist Field for Food selection object

To create fields in an object :

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

The screenshot shows the Salesforce Object Manager. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Food Selection' row in the list below, which includes columns for Name, Label, Type, Last Modified, and Created Date.

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

3.

- a. Now click on “Fields & Relationships” > New

The screenshot shows the 'Fields & Relationships' page for the 'Food Selection' object. A red box highlights the 'Food Selection' label in the breadcrumb trail. 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.

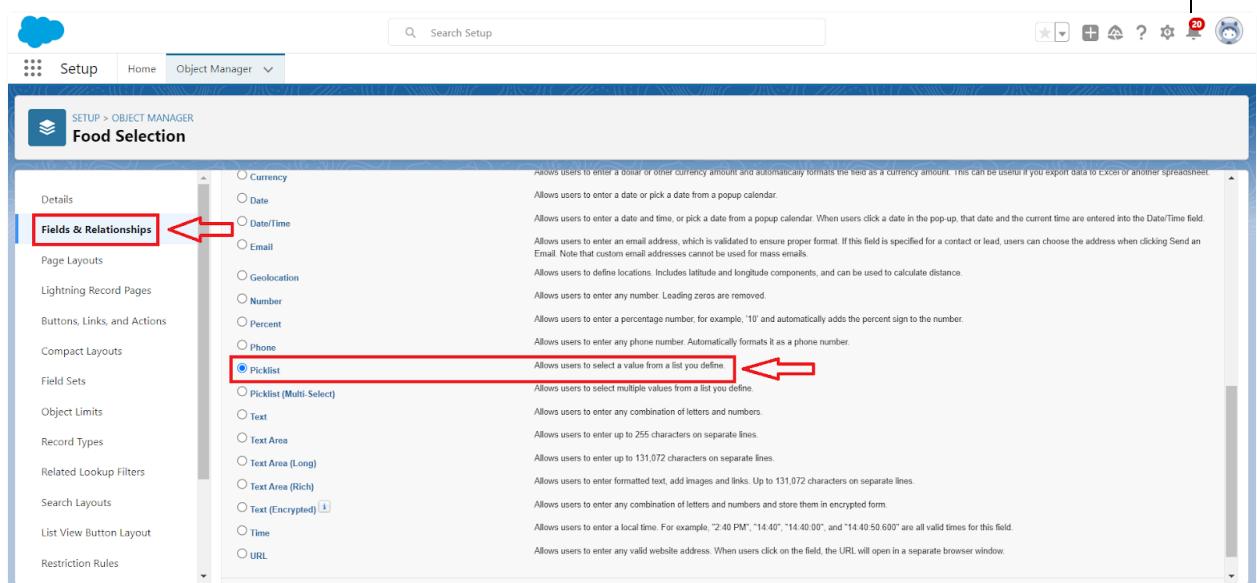
Fields & Relationships					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Breakfast	Breakfast_c	Picklist			
Created By	CreatedById	Lookup(User)			
Dinner	Dinner_c	Picklist			
Food Selection No	Name	Auto Number			
Last Modified By	LastModifiedById	Lookup(User)			
Lunch	Lunch_c	Picklist	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

4.

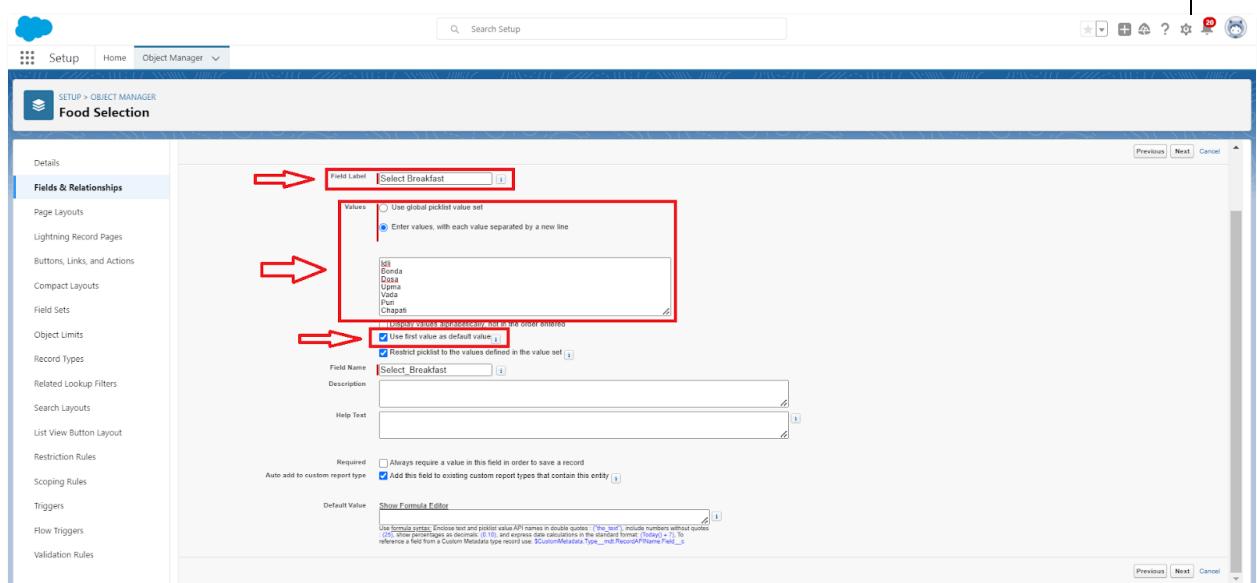
5.

- a. Select Data Type as a “Picklist”

6.



7.



8.

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

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

9.

Field Dependency:

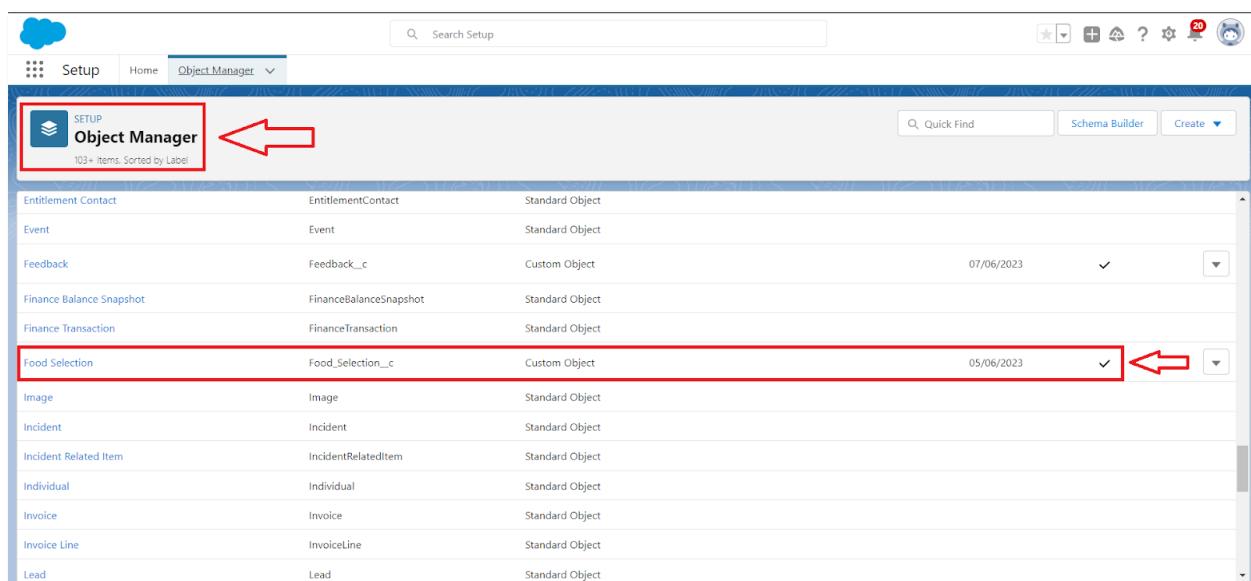
A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by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

Need to use Field Dependency:

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

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

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



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. Below it is a search bar labeled 'Search Setup' and various icons. The main area displays a list of objects with their labels, API names, and object types. The 'Food Selection' object is highlighted with a red box and an arrow pointing to its row. The row for 'Food Selection' also has a red box around its entire entry, with another arrow pointing to the date field '05/06/2023'.

Label	API Name	Type	Created Date
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback_c	Custom Object	07/06/2023
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
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

SETUP > OBJECT MANAGER
Food Selection

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

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

3. Now Click on New Option

SETUP > OBJECT MANAGER
Food Selection

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

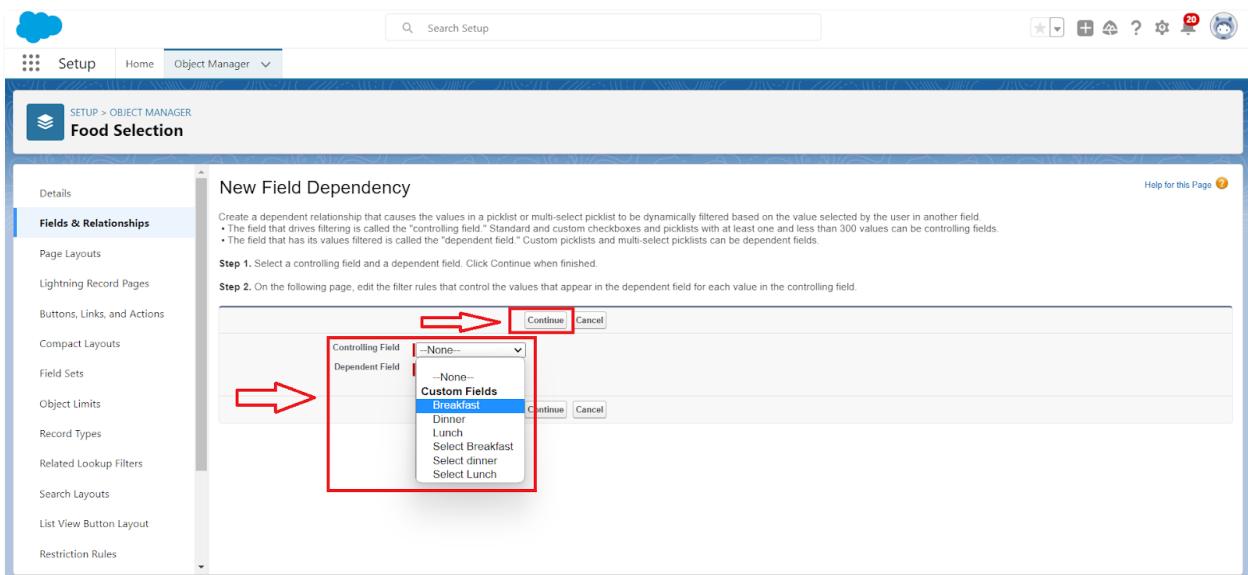
Food Selection Field Dependencies

Back to Custom Object: Food Selection

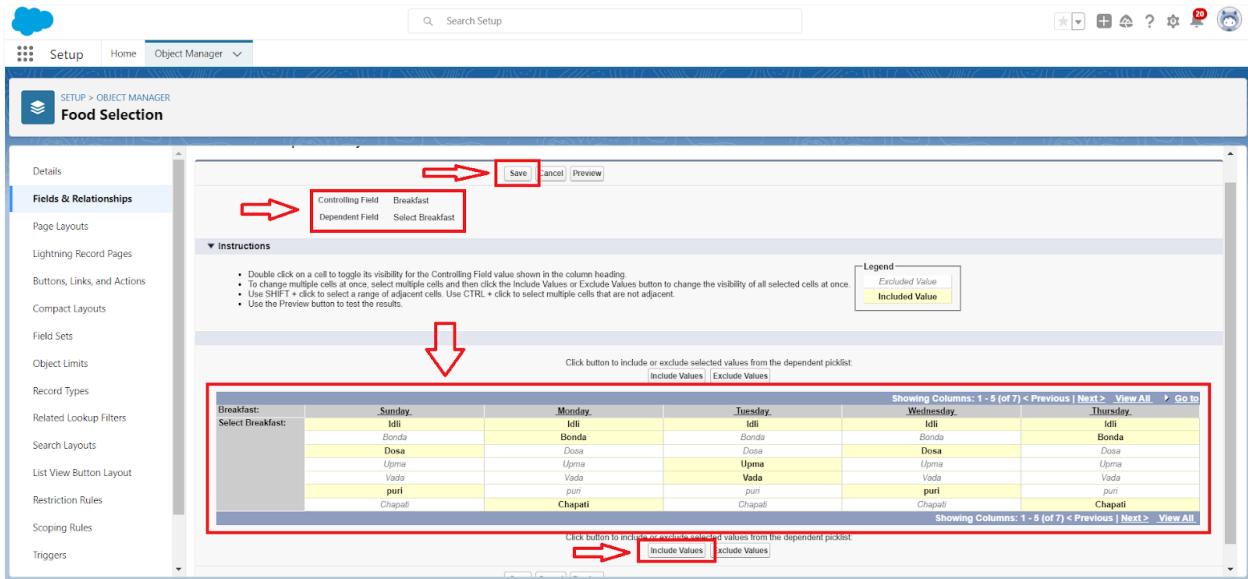
This page allows you to define dependencies between fields (e.g., dependent picklists).

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

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



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



4. To create fields in an object:

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

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

5. To create fields in an object:

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

To create a Field dependencies for Lunch and Select Lunch.

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

6. To create fields in an object:

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

7. To create fields in an object:

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

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

To create a Field dependencies for Lunch and Select Lunch.

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

6. To create fields in an object:

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

7. To create fields in an object:

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

To create a Field dependencies for Dinner and Select Dinner.

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

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

The screenshot shows the 'Edit Field Dependency' page for the 'Food Selection' object. The 'Controlling Field' is set to 'Dinner' and the 'Dependent Field' is also set to 'Dinner'. The main area is a grid where rows represent different meals and columns represent days of the week. Red boxes highlight the 'Save' button at the top right and the 'Include Values' button at the bottom right of the grid. A legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'.

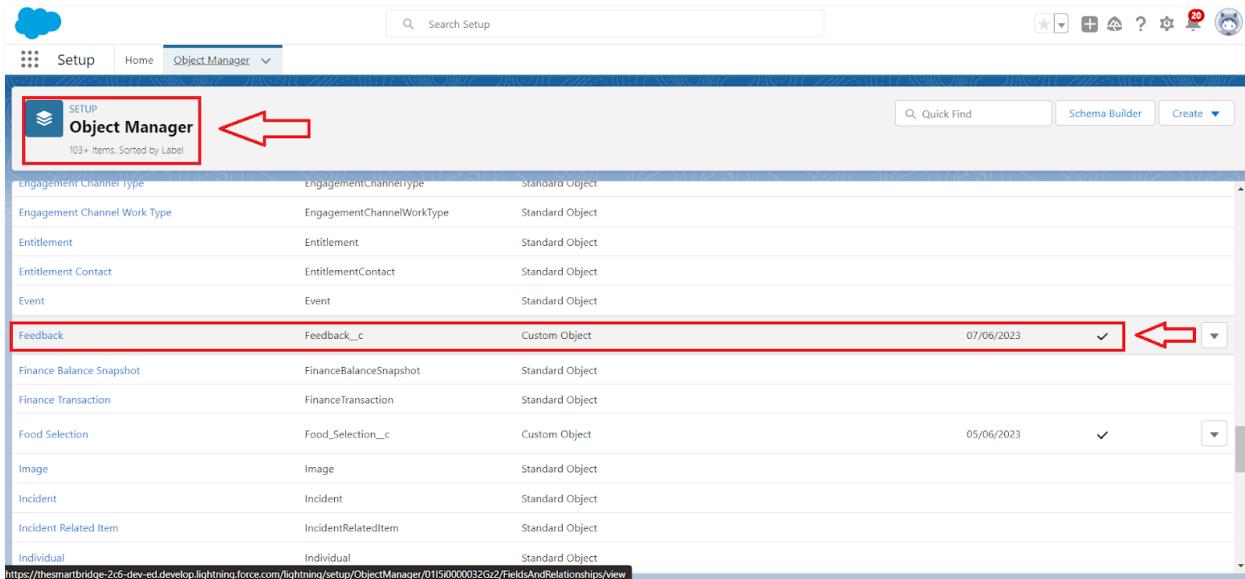
Dinner:	Sunday	Monday	Tuesday	Wednesday	Thursday
Select dinner:	Meals Chicken biryani Veg biryani Veg fried rice Egg Fried rice chicken fried rice curd rice Tomato rice Egg noodles chicken noodles bhagara rice	Meals Chicken biryani Veg biryani Veg fried rice Egg Fried rice chicken fried rice curd rice Tomato rice Egg noodles chicken noodles bhagara rice	Meals Chicken biryani Veg biryani Veg fried rice Egg Fried rice chicken fried rice curd rice Tomato rice Egg noodles chicken noodles bhagara rice	Meals Chicken biryani Veg biryani Veg fried rice Egg Fried rice chicken fried rice curd rice Tomato rice Egg noodles chicken noodles bhagara rice	Meals Chicken biryani Veg biryani Veg fried rice Egg Fried rice chicken fried rice curd rice Tomato rice Egg noodles chicken noodles bhagara rice

ACTIVITY 5:

Creation of fields & relationship to an object

1. create fields & relationship to an object:

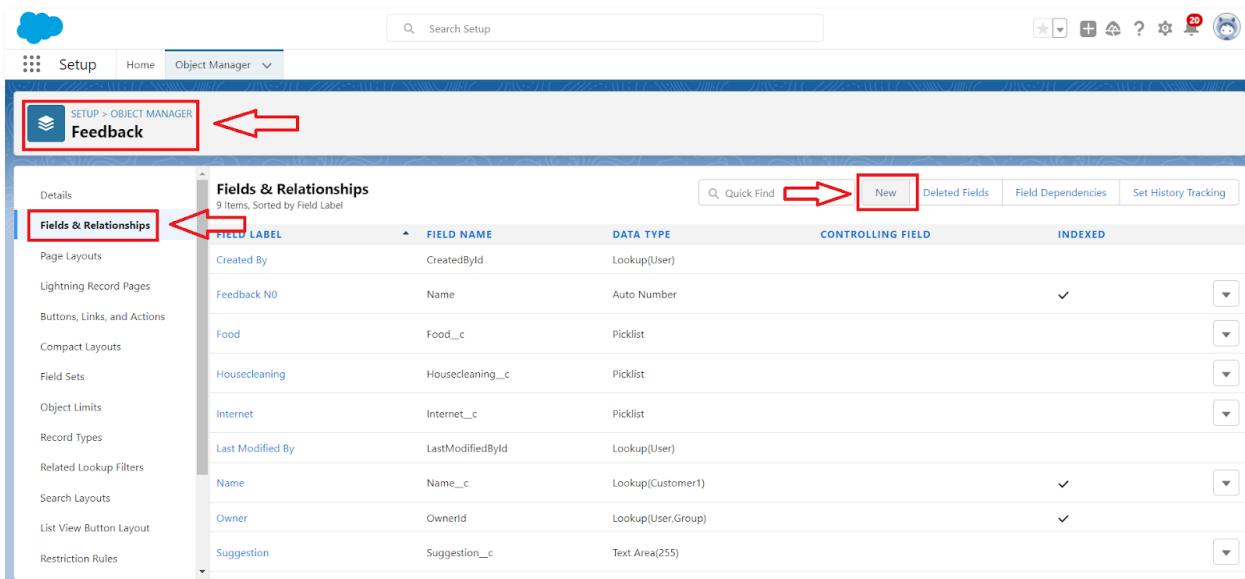
1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.



The screenshot shows the Salesforce Object Manager. A red box highlights the 'Feedback' row in the list. A red arrow points from the left towards the 'Feedback' row. Another red arrow points from the right towards the dropdown menu next to the creation date.

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

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

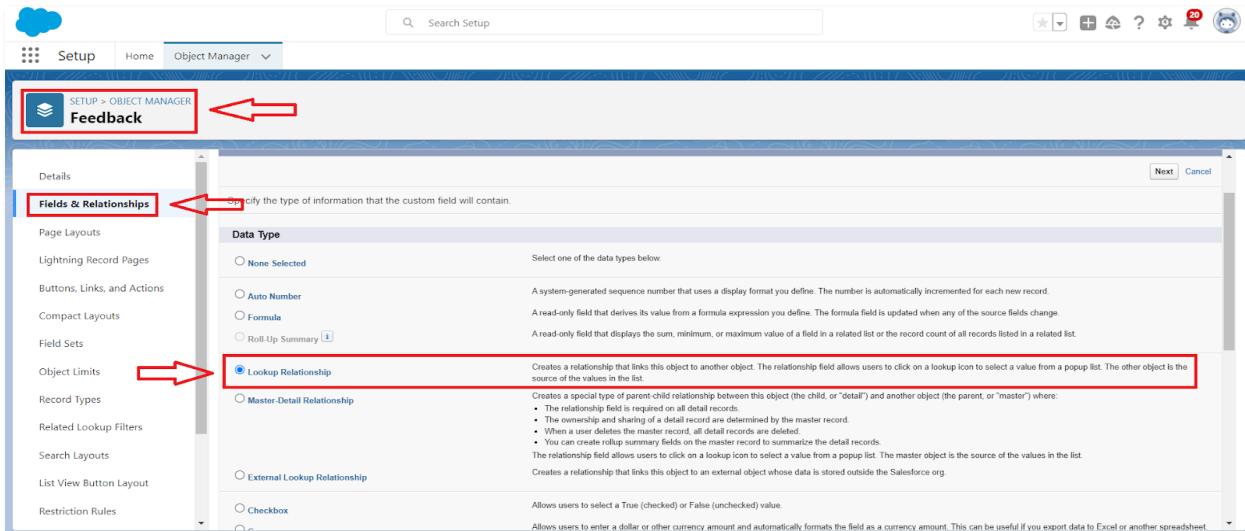


The screenshot shows the 'Fields & Relationships' page for the 'Feedback' object. A red box highlights the 'Feedback' label in the breadcrumb navigation. A red arrow points from the left towards the 'Fields & Relationships' link in the sidebar. Another red arrow points from the right towards the 'New' button in the top right corner of the table header.

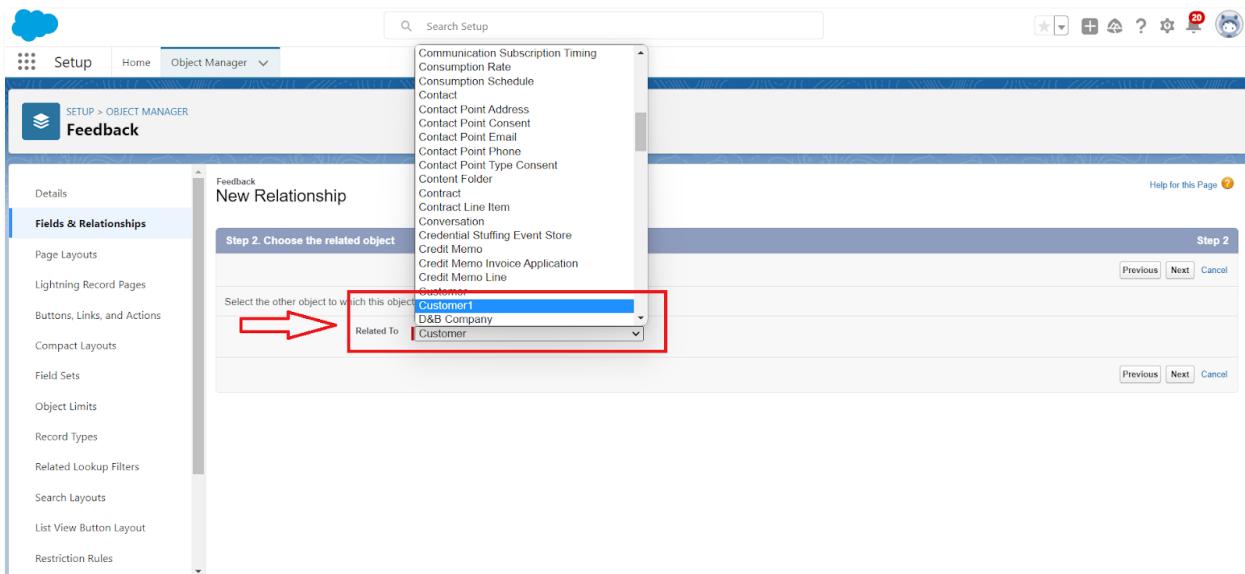
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback NO	Name	Auto Number		
Food	Food__c	Picklist		
Housecleaning	Housecleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)		
Owner	OwnerId	Lookup(User,Group)		
Suggestion	Suggestion__c	Text Area(255)		

3. Select Data Type as a “Lookup Relationship”

4. Click on Next



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



6. Fill the Above as following:

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

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

Field Label (i)

Field Name (i)

Description

Help Text

Child Relationship Name (i)

What to do if the lookup record is deleted? Always require a value in this field in order to save a record. Clear the value of this field. You can't choose this option if you make this field required.

Auto add to custom report type Add this field to existing custom report types that contain this entity (i)

Lookup Filter

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

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 Name	Object API Name	Type	Last Modified Date
Engagement Channel Type	EngagementChannelType	Standard Object	
Engagement Channel Work Type	EngagementChannelWorkType	Standard Object	
Entitlement	Entitlement	Standard Object	
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback_c	Custom Object	07/06/2023
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
Food Selection	Food_Selection__c	Custom Object	05/06/2023
Image	Image	Standard Object	
Incident	Incident	Standard Object	
Incident Related Item	IncidentRelatedItem	Standard Object	
Individual	Individual	Standard Object	

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

SETUP > OBJECT MANAGER
Feedback

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback NO	Name	Auto Number		✓
Food	Food__c	Picklist		
Housedleaning	Housedleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Suggestion	Suggestion__c	Text Area(255)		

3. Select Data Type as a “Picklist”

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

Currency

Date

Date/Time

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

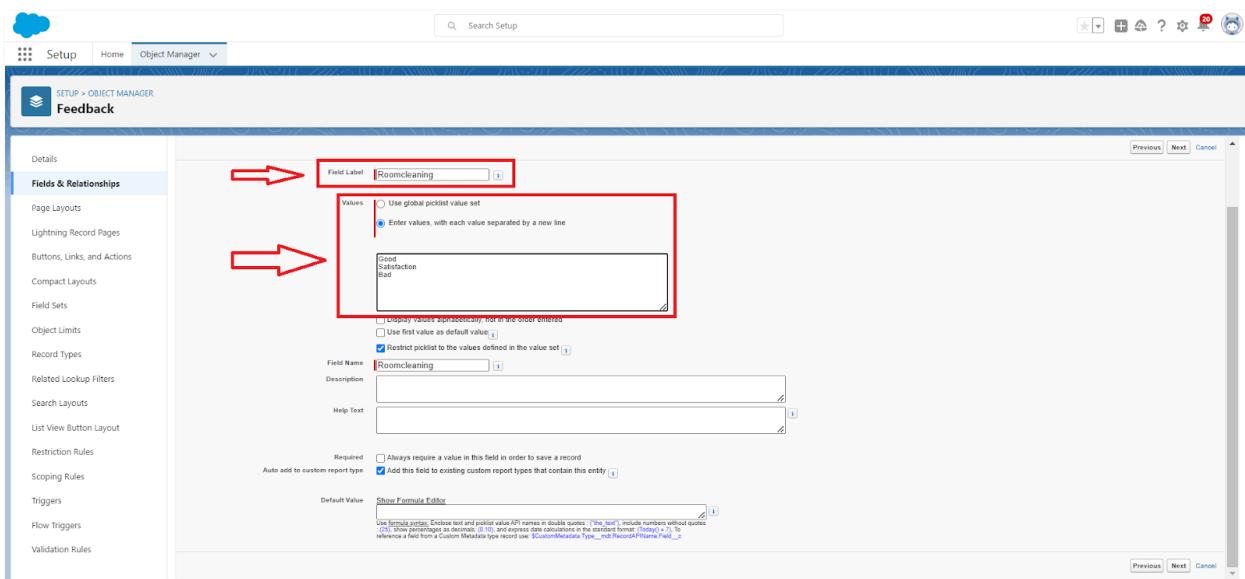
Text Area (Rich)

Text (Encrypted) ?

Time

URL

4. Click on Next



5. Fill the Above as following:

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

3. To create a Another Fields in an Same Object

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

4. To create a Another Fields in an Same Object

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

5. To create a Another Fields in an Same Object

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

ACTIVITY 6:

Creation of fields for the Total Rooms object

1. To create fields in an object:

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

Shift Work Topic	ShiftWorkTopic	Standard Object
Skill Requirement	SkillRequirement	Standard Object
Social Persona	SocialPersona	Standard Object
Store	WebStore	Standard Object
Task	Task	Standard Object
Time Slot	TimeSlot	Standard Object
Total Room	Total_Rooms__c	Custom Object
User	User	Standard Object
User Provisioning Request	UserProvisioningRequest	Standard Object
Voice Call	VoiceCall	Standard Object
Waitlist	Waitlist	Standard Object
Waitlist Participant	WaitlistParticipant	Standard Object

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

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

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

Step 1. Choose the field type

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

Data Type

None Selected

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

Master-Detail Relationship

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

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

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.

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

Field Label: Rooms Available

Field Name: Rooms_Available

Formula Return Type: Number

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

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

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

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

Rooms Available (Number) = 30 - Rooms_Booked__c

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

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

10. Click on Next > Next > Save and next

TASK 6-VALIDATION RULE

ACTIVITY 1:

create a validation rule to an Room Booking Object

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

The screenshot shows the Salesforce Object Manager. 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 also highlighted by a red arrow pointing to its name. The 'Room Booking' row contains columns for Name, Label, and Type, with values 'Room Booking', 'Room_Booking__c', and 'Custom Object' respectively. The 'Modified Date' field shows '07/06/2023'.

Name	Label	Type	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 "Validation rule" at top > New.

The screenshot shows the 'Validation Rules' page for the 'Room Booking' object. A red box highlights the 'Room Booking' object in the top navigation bar. Another red box highlights the 'Validation Rules' link in the left sidebar. A red arrow points to the 'New' button in the top right corner of the main content area.

Validation Rules					
Rule Name	Error Location	Error Message	Active	Modified By	
checkbox_field	Advance payment for 1month	checkbox should be checked	✓	Veera Venkata Varaprasad Androthu, 06/06/2023, 7:30 pm	

3. Enter Rule name "checkbox field" and make the validation should be Active.
4. Enter the formula in the formula Box "Advance_payment_for_1month__c = false" and check for syntax error.
5. Enter the error message "Checkbox should be checked"
6. Select error location as field(Advance payment for 1month)

The screenshot shows the 'Validation Rule Edit' page for the 'checkbox_field' rule. A red box highlights the 'checkbox_field' rule name in the 'Rule Name' field. Another red box highlights the 'Active' checkbox, which is checked. A red arrow points to the formula editor where the formula 'advance_payment_for_1month__c = false' is entered. A red box highlights the 'Error Message' field containing 'checkbox should be checked'. A red arrow points to the 'Error Location' dropdown set to 'Top of Page'. The 'Validation Rules' tab is selected in the left sidebar.

7. Click on save.

ACTIVITY 1:

create a Another validation rule to an Room Booking Object

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

The screenshot shows the 'Create Validation Rule' page in Salesforce. The 'Rule Name' field is filled with 'check_in_rule'. The 'Active' checkbox is checked. In the 'Error Condition Formula' section, the formula 'Check_in__c = False' is entered. Below it, the 'Error Message' is set to 'Check box should be checked'. Under 'Error Location', the 'Field' option is selected and 'Check in' is chosen. A sidebar on the right contains 'Quick Tips' and a link to 'Operators & Functions'.

7. Click on save.

TASK 7-PROFILE

Profile

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot delete standard ones

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

2. Custom Profiles:

Custom ones defined by us.

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

ACTIVITY 1:

Custom user Profile

To create a new profile:

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

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The left sidebar has 'Users' expanded, with 'Profiles' highlighted. A red arrow points to this 'Profiles' link. The main content area is titled 'Profiles' and shows a list of profiles. The 'Standard User' profile is listed, and a red arrow points to the 'Edit | Clone' link next to it. The list also includes other profiles like 'Salesforce API Only System Integrations', 'Silver Partner User', 'Solution Manager', 'Standard Platform User', and 'System Administrator'.

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

SETUP
Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="Custom user"/>

3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

Basic Access

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

Data Administration

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

Session Settings

Session Times Out After: 8 hours of inactivity

Session Security Level Required at Login: None

Password Policies

- User passwords expire in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets:
- Require a minimum 1 day password lifetime:

5. Scroll down and Click on Save.

ACTIVITY 2:

Custom Platform User1

To create a new profile:

1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard platform User)
2. Enter profile name (Custom platform User1) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

The screenshot shows the 'Profiles' section of the Salesforce Setup. It displays two objects with their respective permission sets:

- Object 1 (Left):** Customers, Feedbacks, Food Selections. The 'Basic Access' row has checkboxes for Read, Create, Edit, Delete, View All, and Modify All. The 'Data Administration' row has checkboxes for View All and Modify All.
- Object 2 (Right):** Payments, Room Bookings, Total Rooms. The 'Basic Access' row has checkboxes for Read, Create, Edit, Delete, View All, and Modify All. The 'Data Administration' row has checkboxes for View All and Modify All.

Red boxes highlight the 'Basic Access' and 'Data Administration' sections for both objects. Red arrows point from the 'Basic Access' section of Object 1 to the 'Basic Access' section of Object 2, and from the 'Data Administration' section of Object 1 to the 'Data Administration' section of Object 2.

5. Scroll down and Click on Save.

ACTIVITY 3:

Custom Platform User2

To create a new profile:

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

5. Scroll down and Click on Save

TASK 8-ROLES

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.

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

Your Organization's Role Hierarchy

Nick Enterprises

- ... Add Role
- CEO** Edit | Del | Assign
 - Add Role**
- ... HR Edit | Del | Assign
 - ... Add Role
- ... Manager Edit | Del | Assign
 - ... Add Role
- ... On Site Emp Edit | Del | Assign
 - ... Add Role
- ... Remote Emp Edit | Del | Assign
 - ... Add Role

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

SETUP Roles

Role Edit
New Role

Help for this Page ?

Role Edit

Label	Marketing
Role Name	Marketing
This role reports to	CEO
Role Name as displayed on reports	

Save **Save & New** **Cancel**

- Then click on Save.

ACTIVITY 2:

Receptionist Role

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

SETUP Roles

Role Edit
New Role

Help for this Page ?

Role Edit

Label	Receptionist
Role Name	Receptionist
This role reports to	CEO
Role Name as displayed on reports	

Save **Save & New** **Cancel**

4. Then click on Save.

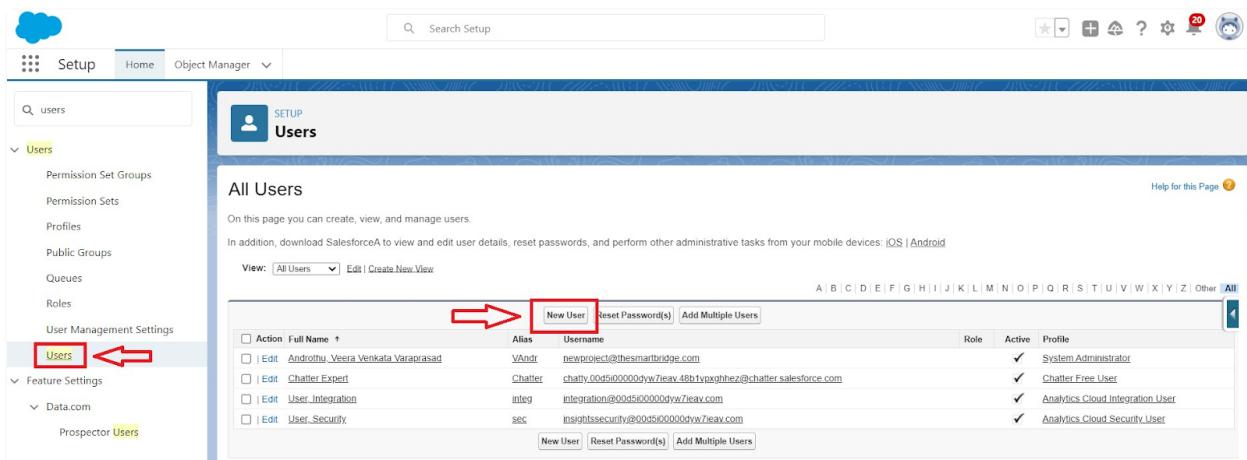
TASK 9-USERS

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.



The screenshot shows the Salesforce Setup interface. On the left, there is a sidebar with a 'Users' section highlighted by a red box and a red arrow pointing to it. The main area is titled 'Users' and shows a list of 'All Users'. At the top of this list, there is a 'New User' button, which is also highlighted by a red box and a red arrow pointing to it. The list includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. Several user entries are listed, each with edit and delete icons.

2. Fill in the fields

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

The screenshot shows the 'User Edit' screen for a new user. The 'General Information' section is highlighted with a red box and an arrow pointing to it from the left. The 'Role', 'User License', and 'Profile' sections are also highlighted with a red box and an arrow pointing to it from the right.

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

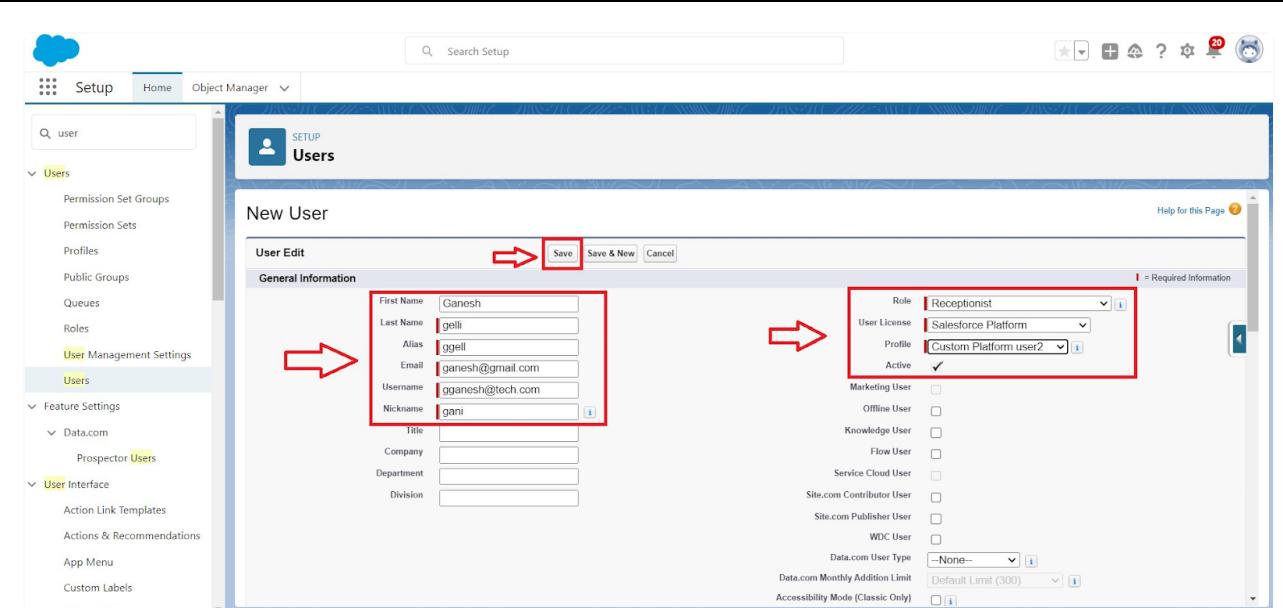
Role: Marketing
User License: Salesforce Platform
Profile: Customer Platform user1
Active:

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



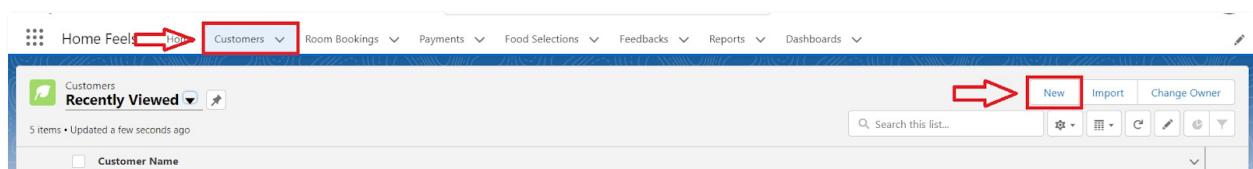
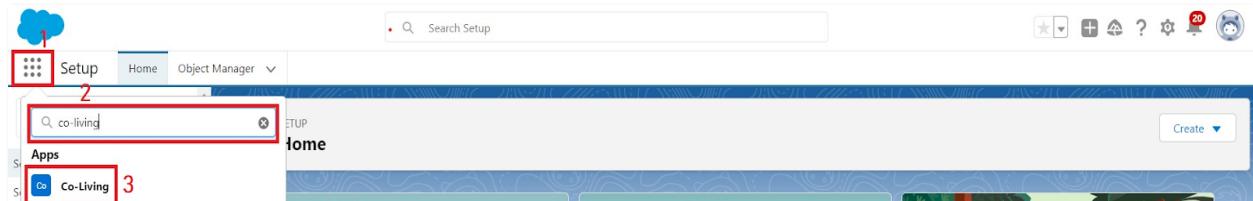
3. Save

TASK 10-USER ADOPTION

ACTIVITY 1:

Create a Record (Customers)

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



3. Click on the Customers Tab.

New Customer1

* = Required Information

Information

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

4. Click new and fill details & Save

ACTIVITY 2:

View a Record (Customers)

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

The screenshot shows the application's main menu with 'Co-Living' and 'Home Feels' selected. Below the menu, there's a search bar and various navigation options like Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Customers' tab is highlighted with a red box. Underneath, a list titled 'Recently Viewed' shows a single item: 'sandeep'. A red arrow points to the 'sandeep' entry in the list.

Customer1
sandeep

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

ACTIVITY 3:

Delete a Record (Customers)

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

TASK

Recently Viewed

Customer Name
1 sandeep
2 Abhilash
3 Ganesh
4 suman
5 Prasad

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 page. At the top, there is a navigation bar with links for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is highlighted with a red box labeled 1), and Dashboards. Below the navigation bar is a sidebar with categories: Reports, Recent, Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of recent reports. The columns include Report Name, Description, Folder, Created By, Created On, and Subscribed. Three specific reports are listed: '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), and 'Sample Flow Report: Screen Flows' (Public Reports, Automated Process, 5/6/2023, 10:09 am). At the top right of the main area, there is a search bar labeled 'Search recent reports...' (red box 2) and a 'New Report' button (red box 3).

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.

The screenshot shows the 'Create Report' dialog. On the left is a sidebar titled 'Category' with sections for Recently Used, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, and Price Books, Products and Assets. The 'All' option is selected and highlighted with a red box labeled 1. In the center is a search panel titled 'Select a Report Type' with a search bar containing 'customers' (red box 2). Below the search bar is a table of report types. The columns are 'Report Type Name' and 'Category'. The table includes rows for 'Activities with Customers' (Standard), 'Customers' (Standard), 'Customers with Room Bookings and Total Rooms' (Standard, highlighted with a red box 3), 'Customers with Payments' (Standard), 'Customers with Payments and Room Booking' (Standard), 'Customers with Food Selections' (Standard), 'Total Rooms with Room Bookings and Customers' (Standard), 'Customers with Room Bookings with Total Rooms' (Custom), and 'Customers with Room Bookings with Payments' (Custom). At the bottom right of the search panel is a dropdown arrow (red box 4).

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

The screenshot shows a report customization interface. On the left, there's a 'Fields' panel with sections for 'Outline', 'Groups', 'Customer Name', 'Columns', and various field names like Room No, Phone no, Email id, etc. Red boxes and arrows highlight the 'Save' button at the top right, the 'Subtotal' section in the Fields panel, and the 'Total' section in the Fields panel. The main area shows a preview of a report with columns for Customer Name, Room No, Phone no, Email id, Permanent Address, current Status, Room sharing, Advance payment for 1month, AC - 3000, and Amount.

Customer Name	Room No	Phone no	Email id	Permanent Address	current Status	Room sharing	Advance payment for 1month	AC - 3000	Amount
RN-006	7300788526	abhi@gmail.com	Chandavaram	Employee	single sharing - 14000	<input checked="" type="checkbox"/>	<input type="checkbox"/>		₹28,000
Ganesh	RN-005	868875423	ganesh@gmail.com	Tadiparlu	Student	Triple sharing - 10000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹20,000
Prasad	RN-001	9494724362	varaprasadandrothu@gmail.com	Tadiparlu	Employee	single sharing - 14000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹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
									₹44,000
suman	RN-004	870587262	suman@gmail.com	Ichapuram	Employee	Double sharing - 12000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹30,000
									₹1,56,000

6. Save or run it.

ACTIVITY 2 :

Create another Report

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

TASK 12-DASHBOARDS

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

Dashboards

Recent

2 items

DASHBOARDS Dashboard Name Description Folder Created By Created On Subscribed

2. Give a Name and click on Create.

New Dashboard

*Name: custom Dashboard

Description:

Folder: Custom Dashboard

Create

3. Select add component.

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

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Room booking report
Veera Venkata Varaprasad Androthu - 14-Jun-2023, 2:58 pm - custom report

Room booking report
Veera Venkata Varaprasad Androthu - 07-Jun-2023, 4:53 pm - Private Reports

Sample Flow Report: Screen Flows
Automated Process - 05-Jun-2023, 10:09 am - Public Reports

Select

Cancel

Edit Component

Title

Subtitle

Footer

Legend Position

Preview

Room booking report

Amount

Sum of Amount: ₹156k

View Report (Room booking report)

Cancel
Update

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

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.

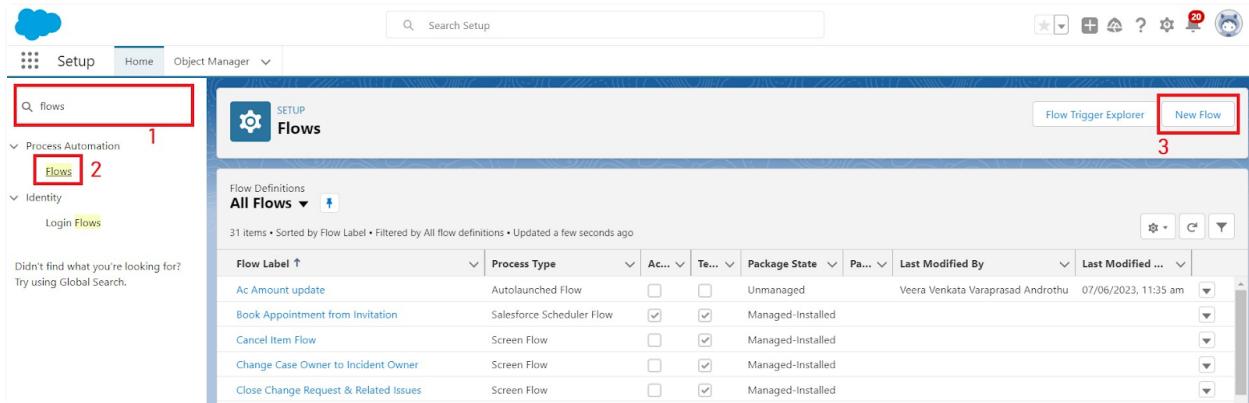
Why do we need to create a flow:

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:

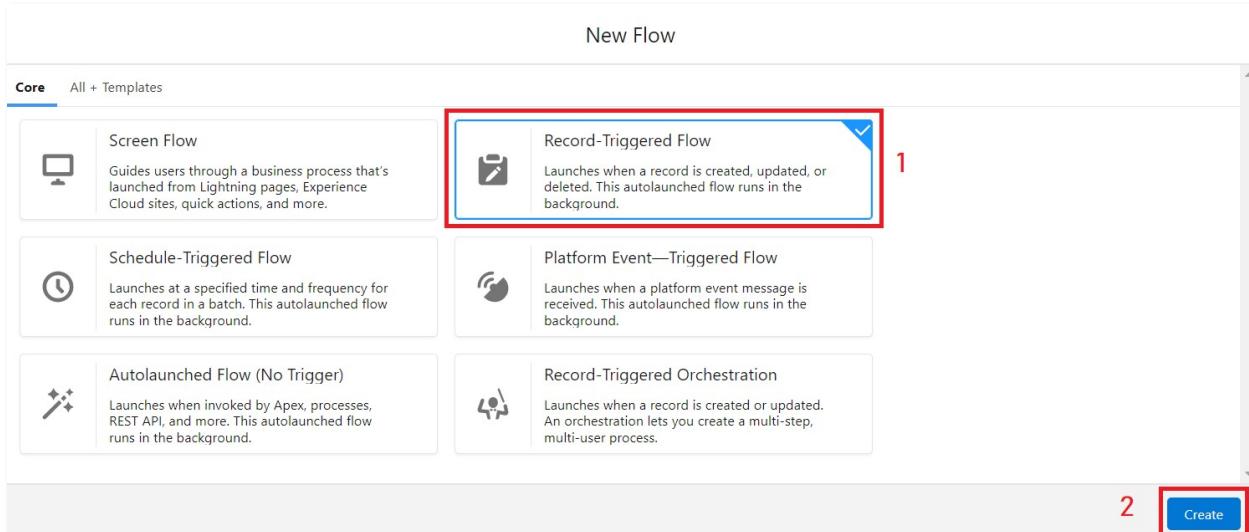
Create A Flow

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, there is a search bar labeled 'flows' (Step 1) and a 'Flows' link under 'Process Automation' (Step 2). In the main content area, there is a 'SETUP Flows' header and a table titled 'Flow Definitions All Flows'. At the top right of the main area, there is a 'New Flow' button (Step 3).

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



The screenshot shows the 'New Flow' creation page. Under the 'Core' tab, there is a list of flow types: 'Screen Flow', 'Record-Triggered Flow' (which is highlighted with a red box and a checkmark icon), 'Schedule-Triggered Flow', 'Platform Event—Triggered Flow', 'Autolaunched Flow (No Trigger)', and 'Record-Triggered Orchestration'. At the bottom right of the page, there is a 'Create' button (Step 2).

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

Configure Start

Select Object

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

Object: Room Booking 1

Configure Trigger

* Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated 2
- A record is deleted

Set Entry Conditions

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

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

Condition Requirements: None 3

* Optimize the Flow for:

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

Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database. 4

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

Cancel Done

6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.

7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.

Page No : 79

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

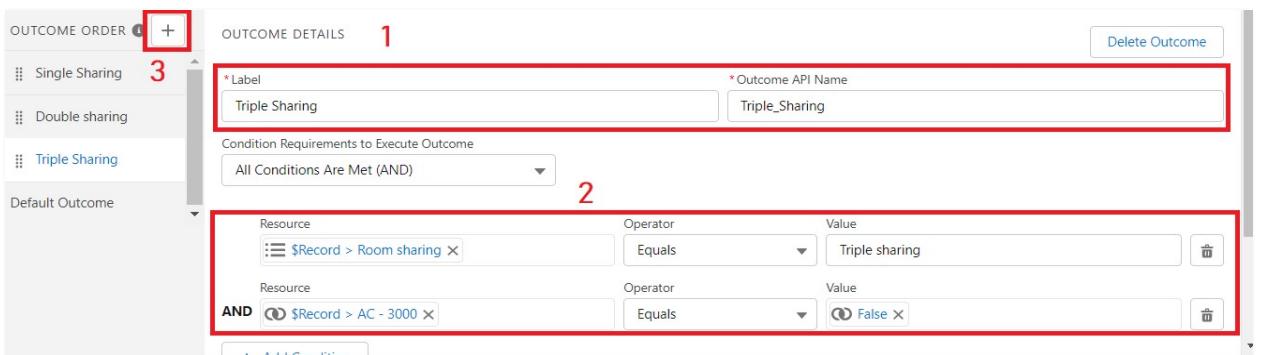
Label Field Should be Update	* API Name Field_Should_be_Update						
Description 1							
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.							
OUTCOME ORDER 4	OUTCOME DETAILS 2						
Single Sharing	* Label Single Sharing * Outcome API Name Single_Sharing						
Default Outcome							
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							
<input type="button" value="Cancel"/> <input type="button" value="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.



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

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



11. Enter the Outcome Details Label: Single Ac, Outcome API name: Gets Automatically Generated.

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

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

The screenshot shows the 'OUTCOME ORDER' sidebar on the left with a '+' button highlighted in red and labeled '3'. The main area is titled 'OUTCOME DETAILS' with a 'Delete Outcome' button. A red box labeled '1' highlights the 'Label' field containing 'Single Ac' and the 'Outcome API Name' field containing 'Single_Ac'. A red box labeled '2' highlights the 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)' and the associated AND condition table. The first row of the table has a red box around it, showing 'Resource: \$Record > Room sharing', 'Operator: Equals', and 'Value: single sharing'. The second row has a red box around it, showing 'Resource: \$Record > AC - 3000', 'Operator: Equals', and 'Value: {!\$GlobalConstant.True}'.

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

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

The screenshot shows the 'OUTCOME ORDER' sidebar on the left with a '+' button highlighted in red and labeled '3'. The main area is titled 'OUTCOME DETAILS' with a 'Delete Outcome' button. A red box labeled '1' highlights the 'Label' field containing 'Double Ac' and the 'Outcome API Name' field containing 'Double_Ac'. A red box labeled '2' highlights the 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)' and the associated AND condition table. The first row of the table has a red box around it, showing 'Resource: \$Record > Room sharing', 'Operator: Equals', and 'Value: Double sharing'. The second row has a red box around it, showing 'Resource: \$Record > AC - 3000', 'Operator: Equals', and 'Value: {!\$GlobalConstant.True}'.

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

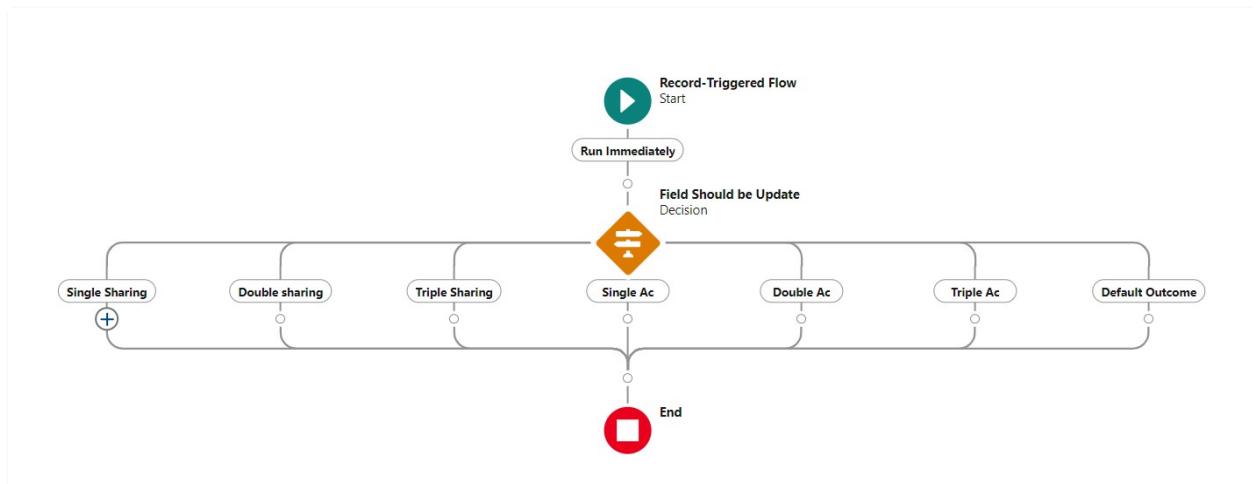
- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Triple sharing.
- Click on "Add Condition"
- Resource: Select Record.AC-3000.
- Operator: Select Equals.

- Value: Select True.
- Click on Done.

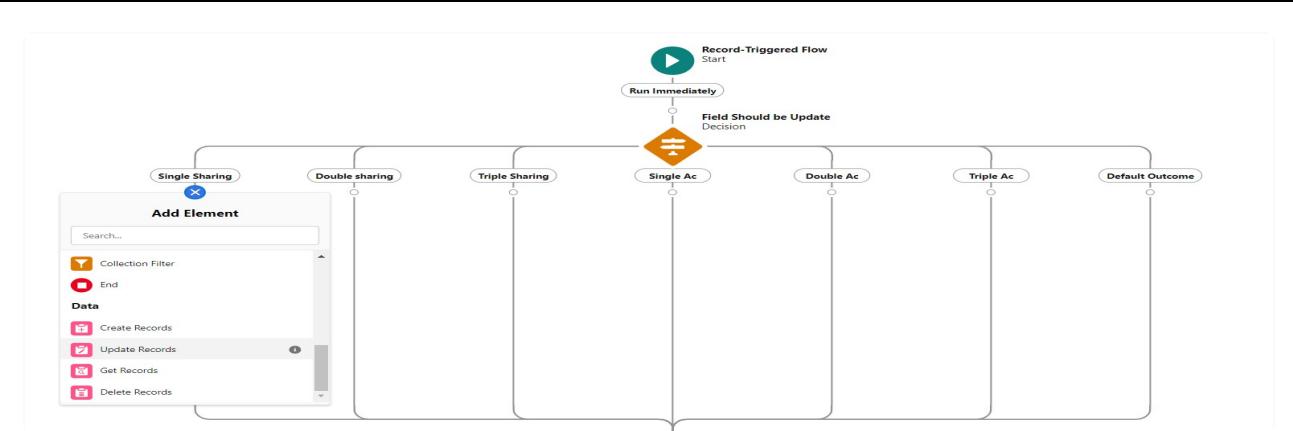
New Decision

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

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



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



15. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label

single

* API Name

single

Description

* How to Find Records to Update and Set Their Values

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Cancel

Done

Set Field Values for the Room Booking Record

Field

Amount_c

Value

28000

16. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

*Label

Double

*API Name

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

 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

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

Triple

*API Name

Triple

Description

* How to Find Records to Update and Set Their Values

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record ▾

Set Field Values for the Room Booking Record

Field

Amount_c

Value

20000



+ Add Field

Cancel

Done

18. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label

single_ac1

* API Name

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

Amount__c

Value

34000



+ Add Field

Cancel

Done

19. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

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

* How to Find Records to Update and Set Their Values

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field	Value
Amount_c	30000

+ 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

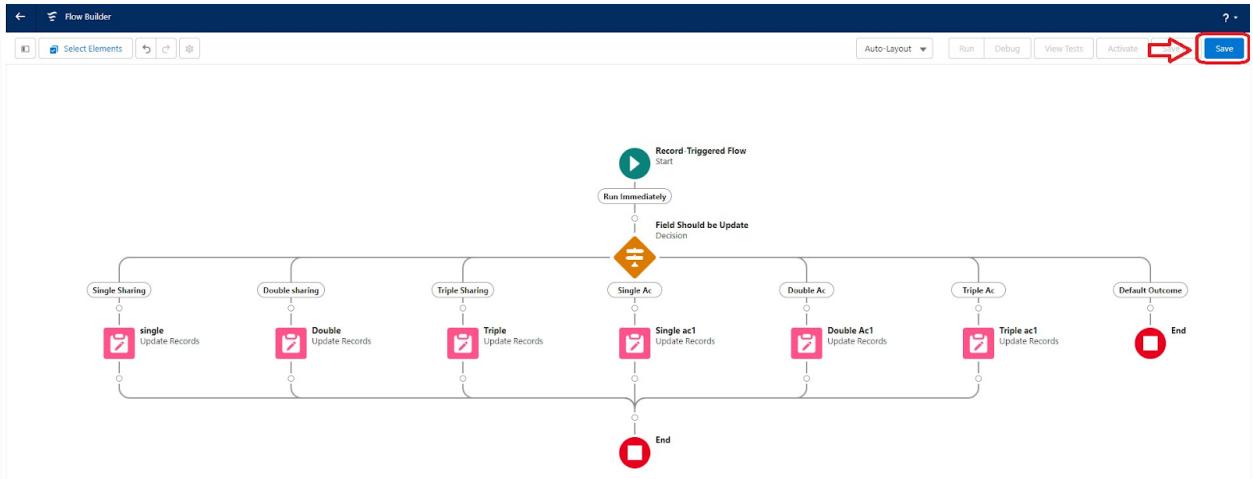


+ Add Field

Cancel

Done

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

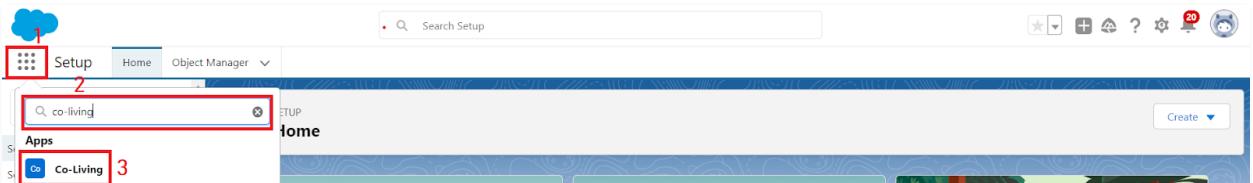


22. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically Generated and Click on Save.

ACTIVITY:

Test The Flow

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



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

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

New Room Booking

* = Required Information

Information

Room No	AC - 3000
*Name	Prasad
*Room sharing	Double sharing - 12000
Amount	

Cancel Save & New Save

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

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

THANK YOU