

A CRM Application to Manage the Booking of Co-Living

By

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Project Abstract

The Co-Living Space project is designed to cultivate a vibrant and inclusive community where individuals can live, work, and connect with like-minded people. By fostering collaboration and reducing isolation, this shared living environment aims to enhance the overall quality of life for its residents.

The project features a thoughtfully designed layout that balances privacy with communal spaces, creating an ideal atmosphere for both personal space and social interaction. The Co-Living Space application serves as a central platform where residents can manage various aspects of their stay. Users can store personal details, select from a variety of air-conditioned rooms with multiple sharing options, and choose daily special food items tailored to their preferences. Additionally, the application facilitates payments through various modes, ensuring convenience for all residents.

To maintain a high standard of living, the platform also enables users to provide feedback on services such as room cleaning, internet connectivity, and food quality. By integrating these features, the Co-Living Space project not only provides a comfortable living environment but also promotes a sense of community and shared responsibility among its residents.

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INTRODUCTION

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

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

TASK1: Create and activate salesforce account

1.1 Creating Developer Account

Creating a developer org in salesforce.

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

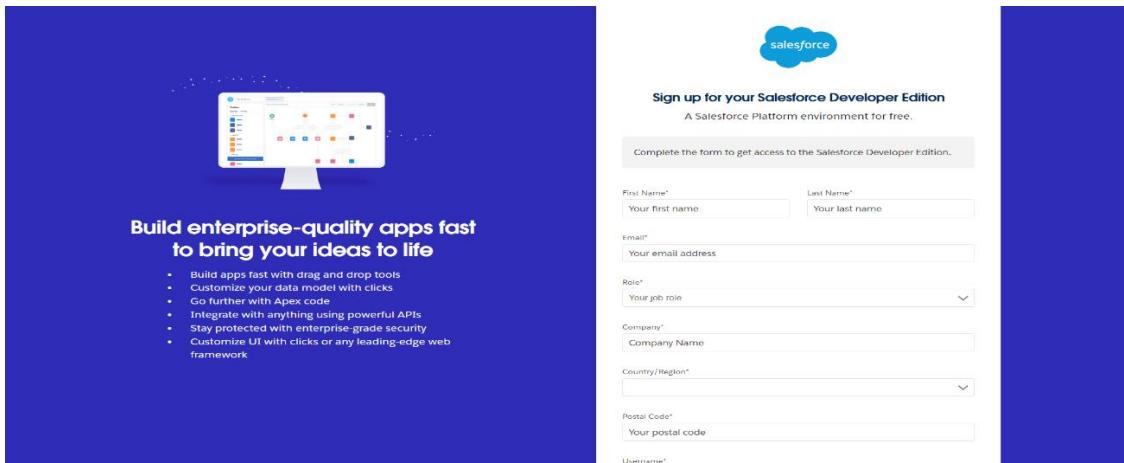
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

Username : should be a combination of your name and company

This need not be an actual email id; you can give anything in the

format: username@organization.com

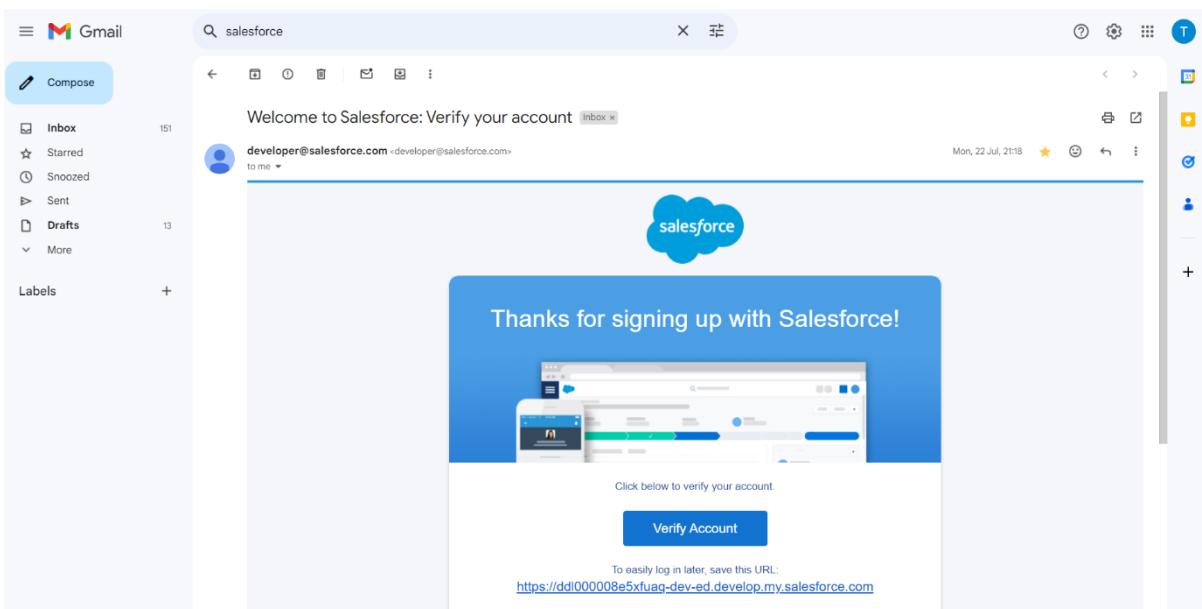
Click on sign me up after filling these.



1.2 Account Activation

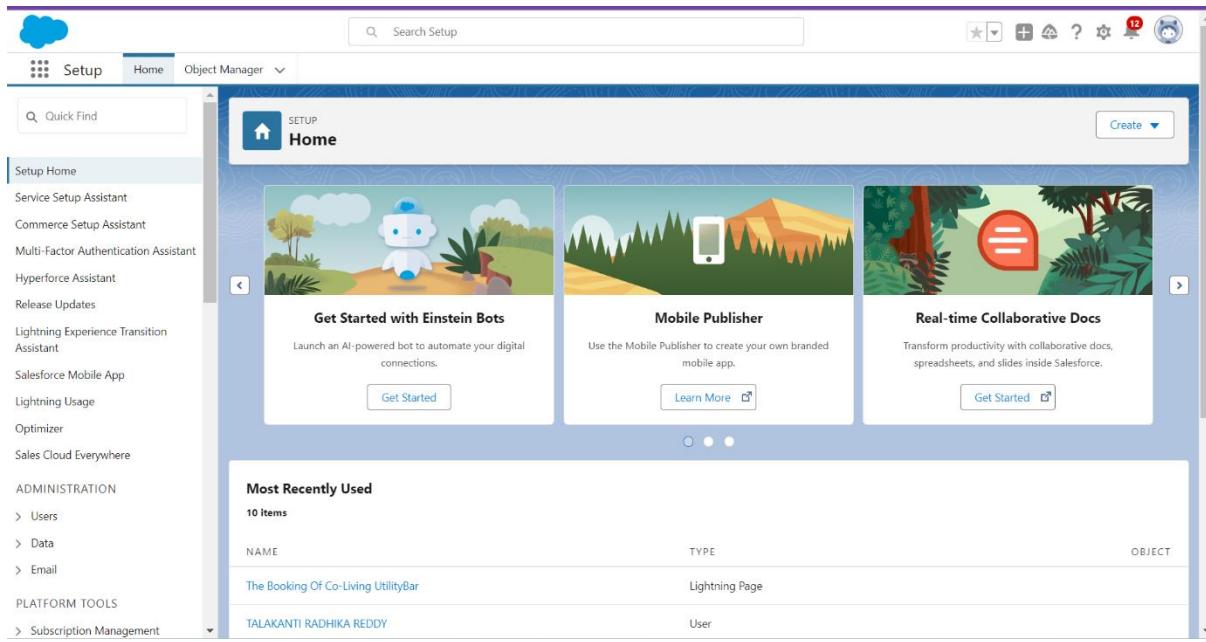
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

2. Click on Verify Account



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

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



TASK2: Create Objects

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

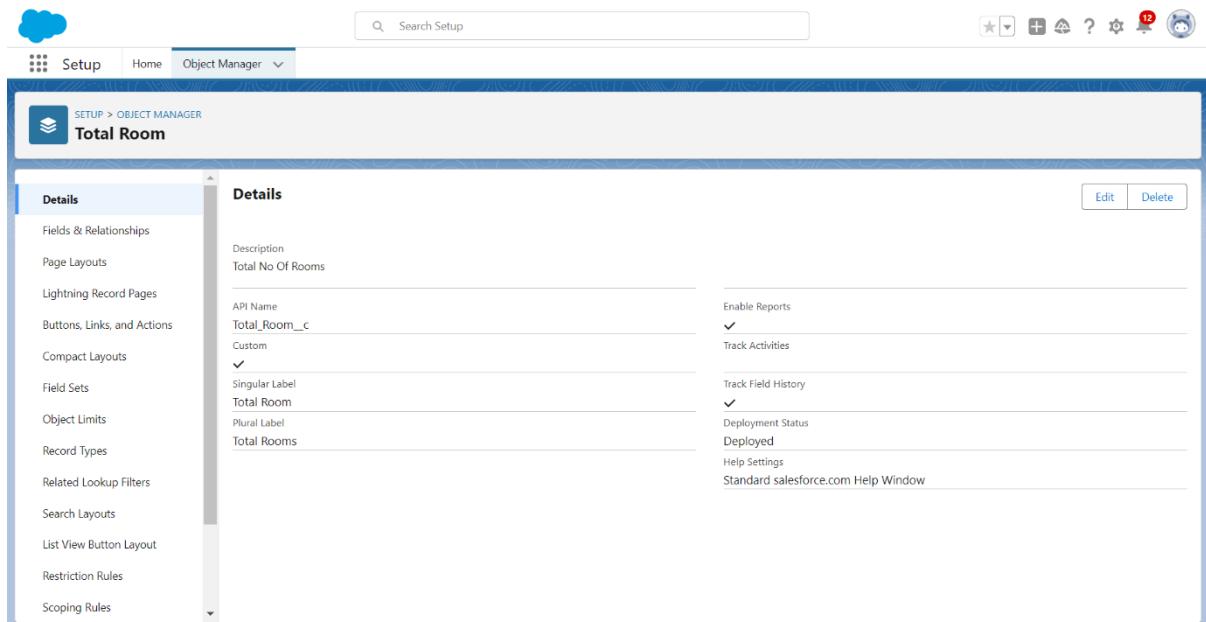
Salesforce objects are of two types:

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.

2.1 Create a custom object for Total Rooms

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Total Room ".
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.



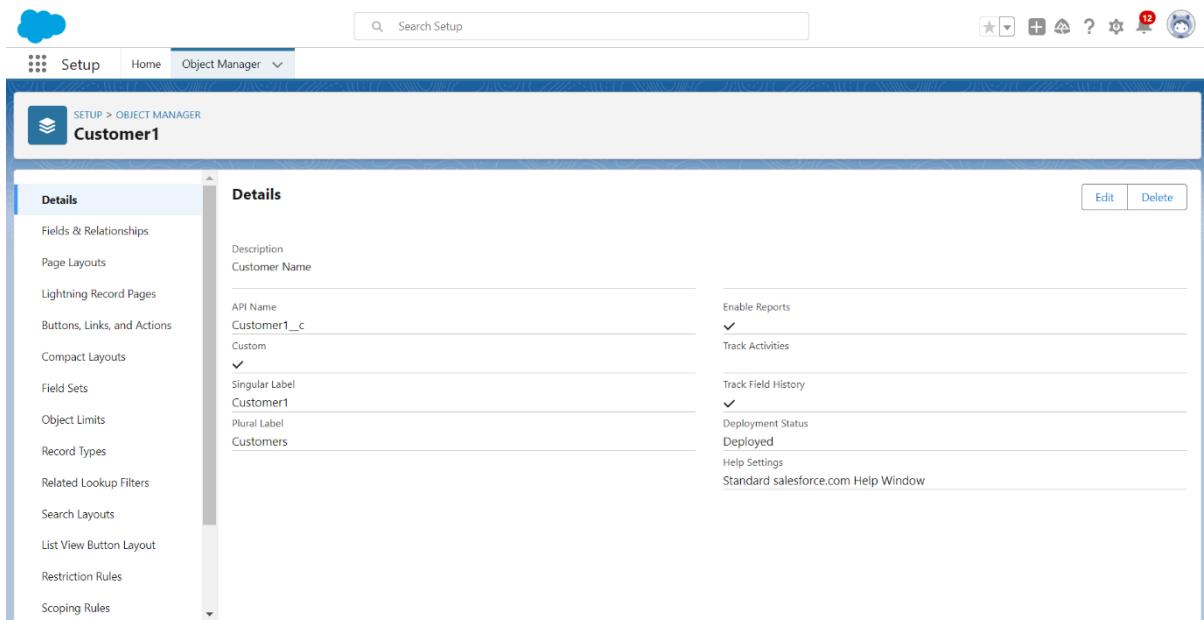
11. Leave everything else as is, and click Save.

2.2 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. Follow steps 7 to 11 as mentioned for previous object.

2.3 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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Room Booking'. On the left, a sidebar lists various configuration options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The main 'Details' section shows the following fields:

Field	Value
Description	Room Booking
API Name	Room_Booking__c
Custom	✓
Singular Label	Room Booking
Plural Label	Room Bookings
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right are 'Edit' and 'Delete' buttons.

9. Follow remaining steps as mentioned previously.

2.4 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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Payment1'. On the left, a sidebar lists various configuration options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The main 'Details' section shows the following fields:

Field	Value
Description	Payment No
API Name	Payment1__c
Custom	✓
Singular Label	Payment1
Plural Label	Payments
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right are 'Edit' and 'Delete' buttons.

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. Follow remaining steps as mentioned previously.

2.5 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

The screenshot shows the Salesforce Setup page with the 'Object Manager' tab selected. A new object named 'Food Selection' is being created. The 'Details' section includes fields for Description (Food Selection), API Name (Food_Selection__c), Singular Label (Food Selection), and Plural Label (Food Selections). Other settings like Enable Reports, Track Activities, and Deployment Status are also visible. The left sidebar lists various object configuration options.

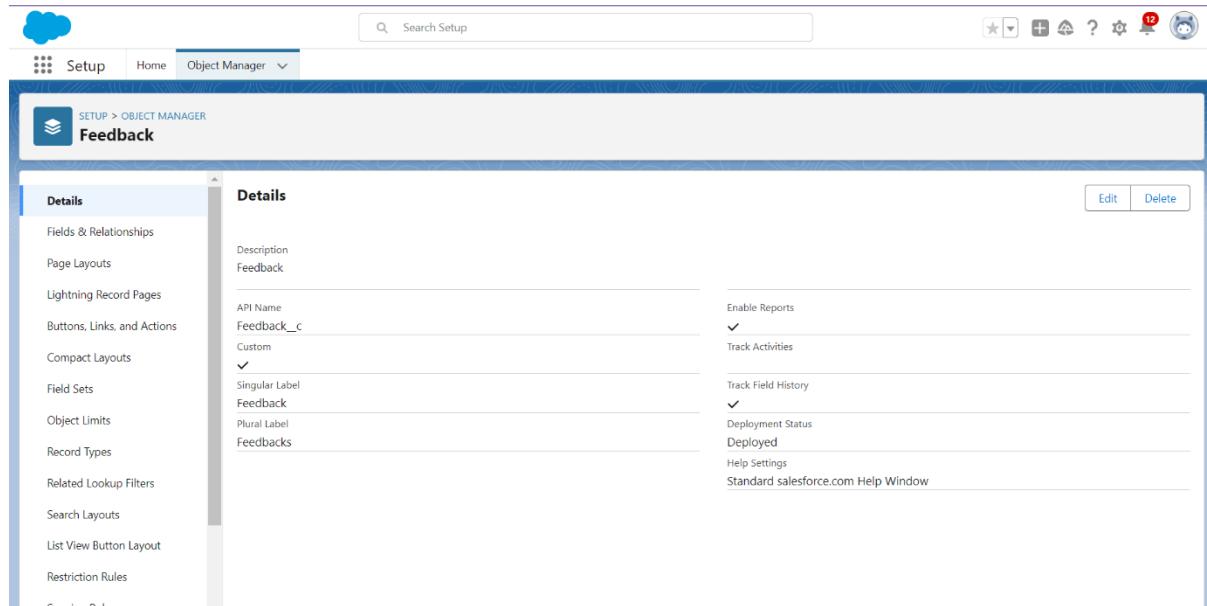
9. Follow remaining steps as mentioned previously.

2.6 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. Follow remaining steps as mentioned previously.

TASK3: Creating Tabs

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

Types of Tabs:

1. Custom Tabs
2. Web Tabs
3. Visualforce Tabs
4. Lightning Component Tabs
5. Lightning Page Tabs

3.1 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

The screenshot shows the Salesforce Setup interface. In the top left, there's a cloud icon and tabs for 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. On the left, a sidebar titled 'User Interface' has sections for 'Rename Tabs and Labels' and 'Tabs', with 'Tabs' being the active tab. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Object Tab' and shows a tab named 'Total Rooms'. It includes fields for 'Tab Label' (Total Rooms), 'Object' (Total Room), 'Description', 'Created By' (TALAKANTI RADHIKA REDDY, 27/07/2024, 9:59 pm), 'Tab Style' (Building), and 'Modified By' (TALAKANTI RADHIKA REDDY, 27/07/2024, 9:59 pm). There are 'Edit' and 'Delete' buttons at the top of this section.

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

3.2 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.

This screenshot is similar to the previous one but shows a different custom tab. The main content area is titled 'Custom Object Tab' and shows a tab named 'Customers'. The 'Tab Label' is 'Customers', 'Object' is 'Customer1', 'Tab Style' is 'Apple', and the 'Created By' and 'Modified By' fields show the same information as the previous screenshot. The rest of the interface, including the sidebar and top navigation, is identical.

3.3 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.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar shows 'User Interface' and 'Tabs'. The main area displays a 'Custom Object Tab' for 'Room Bookings'. The 'Custom Tab Definition Detail' section shows the following information:

Tab Label	Room Bookings
Object	Room Booking
Description	
Created By	TALAKANTI RADHIKA REDDY, 27/07/2024, 10:00 pm
Modified By	TALAKANTI RADHIKA REDDY, 27/07/2024, 10:00 pm

The 'Tab Style' is set to 'Cup'. There are buttons for 'Edit' and 'Delete' at the top right of the detail section.

3.4 Create a Tabs For Remaining Objects

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

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The left sidebar shows 'User Interface' and 'Tabs'. The main area displays a table titled 'Custom Object Tabs' with the following data:

Action	Label	Tab Style	Description
Edit Del	Customers	Apple	
Edit Del	Feedbacks	Globe	
Edit Del	Food Selections	Apple	
Edit Del	Payments	Box	
Edit Del	Room Bookings	Cup	
Edit Del	Total Rooms	Building	

There are 'New' and 'What Is This?' buttons at the top right of the table.

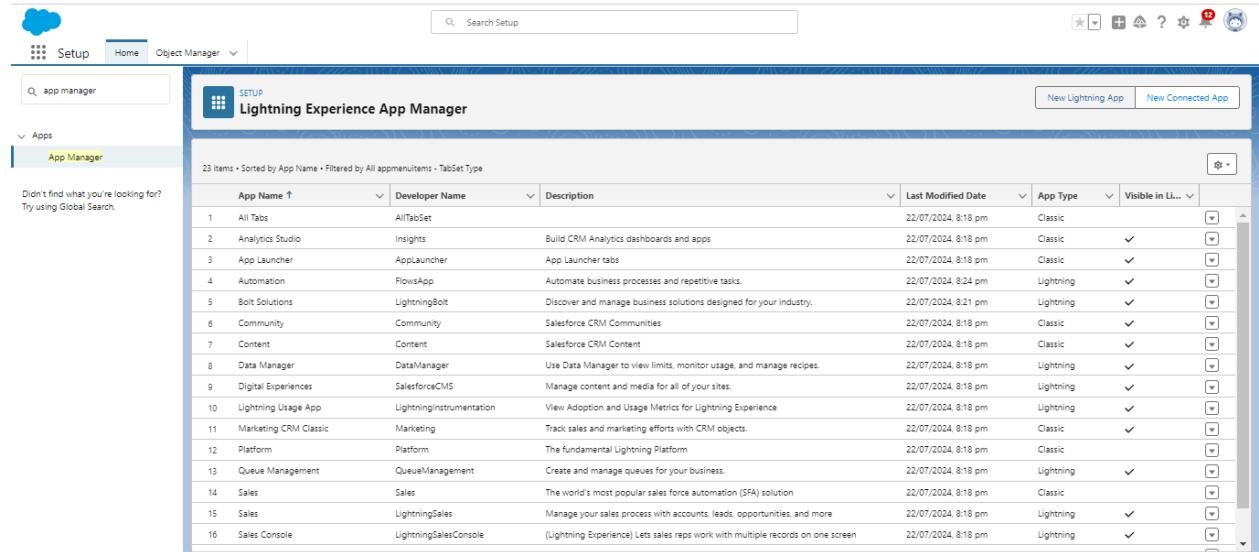
TASK4: The Lightning App

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.

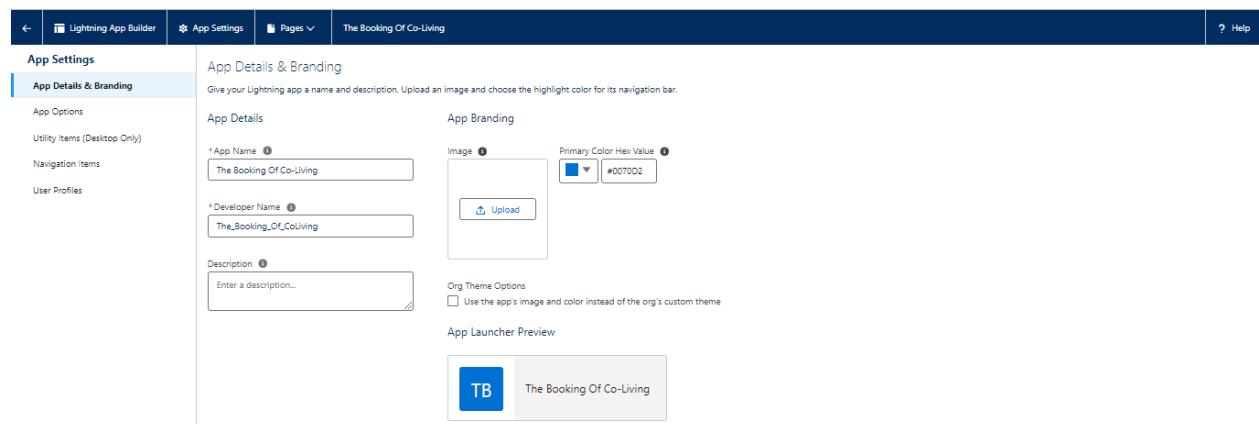
4.1 Create a Lightning App

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



The screenshot shows the "Lightning Experience App Manager" page. At the top, there's a search bar with "Search Setup" and a toolbar with icons for Home, Object Manager, and other setup options. Below the header, there's a sidebar with "App Manager" selected. The main area displays a table titled "23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type". The table columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visible in List. The table lists various built-in apps like All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, Platform, Queue Management, Sales, and Sales Console. Each row includes a "Visible in List" checkbox.

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.



The screenshot shows the "Lightning App Builder" interface. The top navigation bar includes "Lightning App Builder", "App Settings", "Pages", and "The Booking Of Co-Living". The left sidebar has sections for "App Settings", "App Details & Branding" (which is selected), "App Options", "Utility Items (Desktop Only)", "Navigation Items", and "User Profiles". The main content area for "App Details & Branding" shows fields for "App Name" (set to "The Booking Of Co-Living"), "Developer Name" (set to "The_Booking_Of_CoLiving"), and "Description" (with placeholder "Enter a description..."). It also includes "App Branding" settings for "Image" (a placeholder box with an "Upload" button) and "Primary Color Hex Value" (#0070D2). Below these are "Org Theme Options" (unchecked) and "App Launcher Preview" which shows a blue button labeled "TB" and the text "The Booking Of Co-Living".

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.

TASK5: Fields & Relationships

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

1. Created By
2. Owner
3. Last Modified

4. Field Made During Object Creation

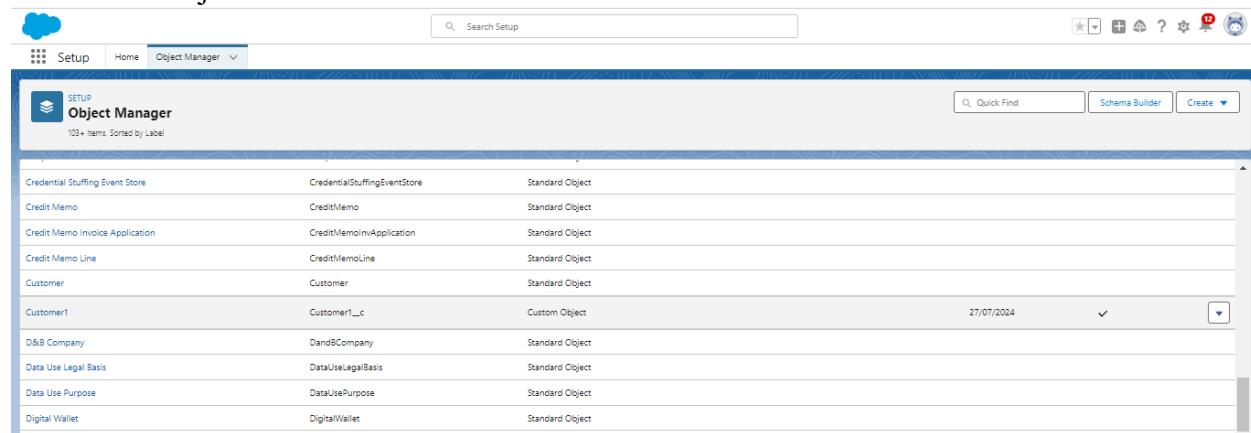
Custom Fields:

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

5.1 Creation of fields for the customer1 object

5.1.1 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 page. At the top, there are tabs for Setup, Home, and Object Manager. The Object Manager tab is active. A search bar at the top right contains the text "Search Setup". Below the tabs, there are buttons for Quick Find, Schema Builder, and Create. The main area displays a list of objects with their names, labels, and types. The object "Customer1" is highlighted with a blue border. Other objects listed include Credential Stuffing Event Store, Credit Memo, Credit Memo Invoice Application, Credit Memo Line, Customer, Customer1_c, D&D Company, Data Use Legal Basis, Data Use Purpose, and Digital Wallet. The "Customer1" row shows "Customer1_c" in the Label column and "Custom Object" in the Type column. The date "27/07/2024" is also visible in the bottom right corner of the list area.

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

3. Select Data Type as a “Phone”

4. Click on next

5. Fill the Above as following:

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

5.1.2 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.

5.1.3 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.

5.1.4 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.

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	Email__c	Email		
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		

5.2 Creation of fields for the Room Booking object

5.2.1 To create fields in an object:

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

5.2.2 To Create a Fields & Relationship to an Room Booking Object

To create fields & relationship to an object:

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

5.2.3 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

5.2.4 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

5.2.5 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
 -

5.2.6 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.

5.2.7 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
7. Click on Next > Next > Save and new

5.2.8 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.

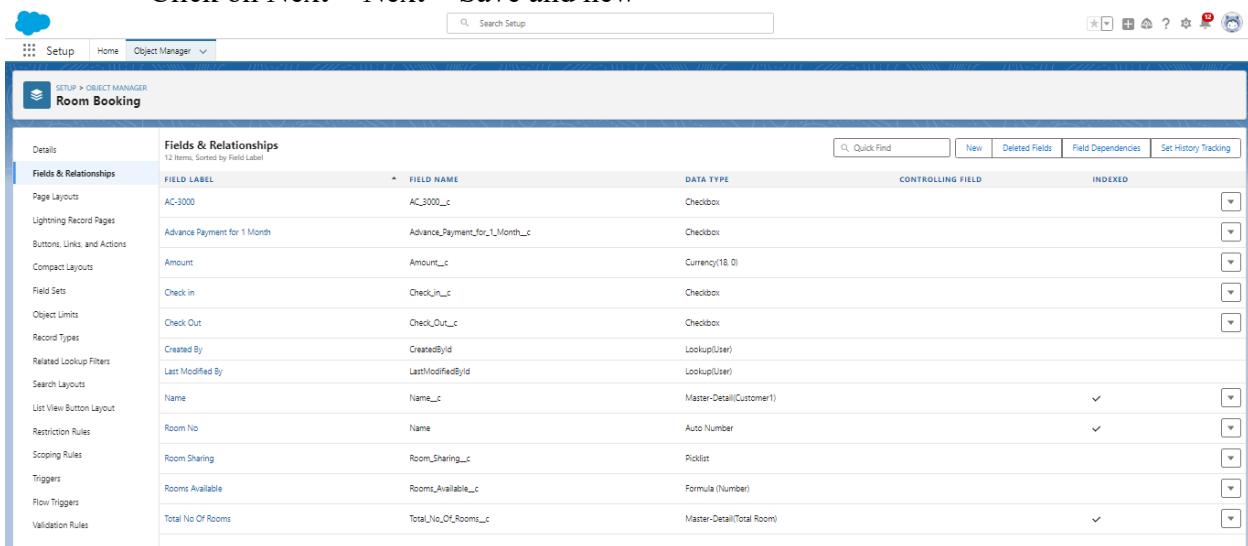
5.2.9 To create fields in an object:

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

5.2.10 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



The screenshot shows the Salesforce Object Manager interface for the 'Room Booking' object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'Fields & Relationships' and shows a table of 12 items, sorted by Field Label. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table includes fields such as AC-3000, Advance Payment for 1 Month, Amount, Check In, Check Out, Created By, Last Modified By, Name, Room No, Room Sharing, Rooms Available, and Total No Of Rooms. Most fields are of type Checkbox or Picklist, except for Amount (Currency/18.0), Room No (Auto Number), and Rooms Available (Formula/Number). Controlling fields are listed for some rows, and the Indexed column contains dropdown arrows.

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	AC-3000	AC_3000__c	Checkbox		
Lightning Record Pages	Advance Payment for 1 Month	Advance_Payment_for_1_Month__c	Checkbox		
Buttons, Links, and Actions	Amount	Amount__c	Currency(18, 0)		
Compact Layouts	Check In	Check_In__c	Checkbox		
Field Sets	Check Out	Check_Out__c	Checkbox		
Object Limits	Created By	CreatedById	Lookup(User)		
Record Types	Last Modified By	LastModifiedById	Lookup(User)		
Related Lookup Filters	Name	Name__c	Master-Detail(Customer1)		
Search Layouts	Room No	Name	Auto Number		
List View Button Layout	Room Sharing	Room_Sharing__c	Picklist		
Restriction Rules	Rooms Available	Rooms_Available__c	Formula(Number)		
Scoping Rules	Total No Of Rooms	Total_No_Of_Rooms__c	Master-Detail(Total Room)		
Triggers					
Flow Triggers					
Validation Rules					

5.3 Creation of Fields & Relationship for Payment1 Object

5.3.1 To create fields & relationship to an object:

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

5.3.2 To create another fields & relationship to an object:

- Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
- Now click on “Fields & Relationships” > New
- Select Data Type as a “Lookup Relationship”
- Click on Next

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

5.3.3 Creation of other fields for the Payment1 object

To create fields in an object:

- Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
- Now click on “Fields & Relationships” > New
- Select Data Type as a “Picklist”
- 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.

5.3.4. Create a Cross-object formula Field in Payment1 Object

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

- Now click on “Fields & Relationships” > New
- Select Data Type as a “Formula”
- Click on Next
- Enter the Field label: Amount and Field name: gets auto generated and click on Next
- 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 ”.
- Click on the Check syntax: No syntax errors in merge fields
- Click on Next > Next > Save and new.

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Amount and Field	Amount_and_Field_c	Formula (Currency)		
Lightning Record Pages	Created By	CreatedBy	Lookup(User)		
Buttons, Links, and Actions	Last Modified By	LastModifiedBy	Lookup(User)		
Compact Layouts	Name	Name_c	Master-Detail(Customer1)		
Field Sets	Payment Mode	Payment_Mode_c	Picklist		
Object Limits	Payment No	Name	Auto Number		
Record Types	Room Booking	Room_Booking_c	Lookup(Room Booking)		
Related Lookup Filters					
Search Layouts					
List View Button Layouts					

5.4. Creation of fields for the Food Selection object

5.4.1 To create fields & relationship to an object:

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

Picklist value sets:

Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values.

Create a picklist value set:

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

5.4.2 Create a picklist Field for Food selection object

To create fields in an object:

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

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

5.4.3 Create 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. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Select Breakfast
 - Under Value - Enter values, with each value separated by a new line
 1. Idli
 2. Bonda
 3. Dosa
 4. Upma
 5. Vada
 6. Puri
 7. Chapati
 - Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

Field Dependency:

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

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

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

5.4.4 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.

5.4.5 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.

Fields & Relationships 10 Items, Sorted by Field Label					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Details	Breakfast	Breakfast_c	Picklist		
Fields & Relationships	Created By	CreatedBy_id	Lookup(User)		
Page Layouts	Dinner	Dinner_c	Picklist		
Lightning Record Pages	Food Selection No	Name	Auto Number		✓
Buttons, Links, and Actions	Last Modified By	LastModifiedBy_id	Lookup(User)		
Compact Layouts	Lunch	Lunch_c	Picklist		
Field Sets	Name	Name_c	Master-Detail(Customer)		✓
Object Limits	Select Breakfast	Select_Breakfast_c	Picklist	Breakfast	
Record Types	Select Dinner	Select_Dinner_c	Picklist	Dinner	
Related Lookup Filters	Select Lunch	Select_Lunch_c	Picklist	Lunch	
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Triggers					

To create a Field dependency 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.

5.4.6 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.

5.4.7 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
 - Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

To create a Field dependencies for Dinner and Select Dinner.

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

The screenshot shows the Salesforce Setup Home page with the 'Edit Field Dependency' interface open. The interface allows users to manage field dependencies between objects. A legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'. The main area contains a grid of food items categorized by meal type (Breakfast, Main, Dessert). The grid includes columns for 'Dinner', 'Breakfast', 'Main', 'Dessert', and 'Meals'. The 'Meals' column lists various food items like Chicken biryani, Veg biryani, Veg fried rice, Egg fried rice, Chicken fried rice, Curd rice, Tomato rice, Egg noodles, Chicken Noodles, and Bragare rice. The 'Breakfast' and 'Dessert' columns also list similar items. The 'Main' column lists items like Meats, Veg biryani, Veg fried rice, Egg fried rice, and Bragare rice.

5.5. Creation of fields for the Feedback object

5.5.1 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.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Lookup Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the Customer1 object and click on Next
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name: It’s gets auto generated
 - Click on Next > Next > Save and new.

5.5.2 To create other fields in an Same object:

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

5.5.3 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.

5.5.4 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.

5.5.5 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.

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Details	Created By	CreatedById	Lookup(User)		
Fields & Relationships	Feedback No	Name	Auto Number		
Page Layouts	Food	Food__c	Picklist		
Lightning Record Pages	Internet	Internet__c	Picklist		
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Name	Name__c	Lookup(Customer1)		
Field Sets	Owner	OwnerId	Lookup(User Group)		
Object Limits	RoomCleaning	RoomCleaning__c	Picklist		
Record Types	Suggestion	Suggestion__c	Text Area(255)		
Related Lookup Filters					
Search Layouts					
List View Button Layout					
Restriction Rules					
Scoping Rules					
Triggers					

5.6. Creation of fields for the Total Rooms object

5.6.1 To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Total Rooms) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
5. Field Label: Rooms Available
6. Field Name : It's gets auto generated
7. Select the Formula Return Type as “Number”
8. Select the Decimal places as “0” and Click on Next
9. Note: I am Considering “Total No Of Rooms = 30” While creating a new record in Total Rooms Object.
10. Click on the Advanced Formula “ 30 - Rooms_Booked__c ” and Check Syntax
11. Click on Next > Next > Save and new.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Rooms Available	Rooms_Available__c	Formula (Number)		
Rooms Booked	Rooms_Booked__c	Roll-Up Summary (COUNT Room Booking)		
Total No Of Rooms	Name	Text(20)		

TASK6: Validation rule

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

6.1 Create a validation rule to a Room Booking Object

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Validation rule” at top > New.
3. Enter Rule name “checkbox field” and make the validation should be Active.
4. Enter the formula in the formula Box “Advance_payment_for_1month__c = false” and check for syntax error.
5. Enter the error message “Checkbox should be checked”
6. Select error location as field (Advance payment for 1month)
7. Click on save.

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

- Setup > Object Manager**
- Room Booking**
- Room Booking Validation Rule**
- Validation Rule Detail**
- Active**: checked
- Rule Name**: checkbox_field
- Error Condition Formula**: Advance_Payment_for_1_Month__c = false
- Error Message**: Checkbox should be checked
- Description**: (empty)
- Created By**: TALAKANTI RADHIKA REDDY 28/07/2024, 6:23 pm
- Modified By**: TALAKANTI RADHIKA REDDY 28/07/2024, 6:23 pm
- Help for this Page**: ⓘ

The left sidebar lists various object management options: 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, and Scoping Rules.

6.2 Create a Another validation rule to a Room Booking Object

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

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

- Setup > Object Manager**
- Room Booking**
- Room Booking Validation Rule**
- Validation Rule Detail**
- Active**: checked
- Rule Name**: check_in_rule
- Error Condition Formula**: Check_in__c = false
- Error Message**: Check box should be checked
- Description**: (empty)
- Created By**: TALAKANTI RADHIKA REDDY 28/07/2024, 6:25 pm
- Modified By**: TALAKANTI RADHIKA REDDY 28/07/2024, 6:25 pm
- Help for this Page**: ⓘ

The left sidebar lists various object management options: 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, and Scoping Rules.

TASK7: Creating Profiles

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.

2. Custom Profiles:

Custom ones defined by us.

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

7.1 Custom user Profile

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. A 'Custom User' profile is selected. The profile details include:

- Name: Custom User
- User License: Salesforce
- Description: (empty)
- Created By: TALAKANTI RADHIKA REDDY, 28/07/2024, 6:27 pm
- Modified By: TALAKANTI RADHIKA REDDY, 28/07/2024, 6:29 pm

Under 'Page Layouts', the following assignments are listed:

Standard Object Layouts	Global	Location Group Assignment
Email Application	Not Assigned	Macro
Home Page Layout	DE Default	Object Milestone
Account	Account Layout	Operating Hours
Alternative Payment Method	Alternative Payment Method Layout	Opportunity

2. Enter profile name (Custom User) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to Custom Object Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.
5. Scroll down and Click on Save.

7.2 Custom platform user1

To create a new profile:

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

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

- Profile Details:** Name: Custom platform User1, User License: Salesforce Platform, Description: (empty), Created By: TALAKANTI RADHIKA REDDY, Created Date: 28/07/2024, 6:30 pm, Modified By: TALAKANTI RADHIKA REDDY, Modified Date: 28/07/2024, 6:31 pm.
- Page Layouts:** Standard Object Layouts: Global (Global Layout [View Assignment]), Email Application (Not Assigned [View Assignment]), Home Page Layout (Home Page Default [View Assignment]), Account (Account Layout [View Assignment]), Alternative Payment Method (Alternative Payment Method Layout [View Assignment]), Appointment Invitation (Appointment Invitation Layout [View Assignment]). Lead (Lead Layout [View Assignment]), Location (Location Layout [View Assignment]), Location Group (Location Group Layout [View Assignment]), Location Group Assignment (Location Group Assignment Layout [View Assignment]).
- Custom Object Permissions:** A table showing permissions for various objects. For example, for 'Customers', 'Read' and 'Create' are checked under 'Basic Access', while 'Edit', 'Delete', 'View All', and 'Modify All' are unchecked. Similar patterns are shown for 'Feedbacks', 'Food Selections', 'Payments', 'Room Bookings', and 'Total Rooms'.

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

- Contact Point Permissions:** Contact Point Addresses, Contact Point Consents, Contact Point Emails. Each row has checkboxes for Read, Create, Edit, Delete, View All, and Modify All.
- Custom Object Permissions:** A table showing permissions for various objects. For example, for 'Customers', 'Read' and 'Create' are checked under 'Basic Access', while 'Edit', 'Delete', 'View All', and 'Modify All' are unchecked. Similar patterns are shown for 'Feedbacks', 'Food Selections', 'Payments', 'Room Bookings', and 'Total Rooms'.

7.3 Custom platform user2

To create a new profile:

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

The screenshot shows the Salesforce Setup interface for creating a new profile. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top left contains the text 'profil'. On the left sidebar, under 'Users', 'Profiles' is selected. A message below the sidebar says, 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Profiles' and shows a grid of permissions for various objects. The 'Custom Object Permissions' section includes tables for 'Customers', 'Feedbacks', 'Food Selections', 'Payments', 'Room Bookings', and 'Total Rooms'. Each table has columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). The 'Customer' row is highlighted with a blue background. At the bottom of the page, there are sections for 'Session Settings' (Session Times Out After: 2 hours of inactivity) and '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).

TASK8: Creating 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.

8.1 Marketing Role

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

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with a search bar and sections for Users (Roles), Feature Settings, Sales, Service, and Case Teams. The 'Roles' section is selected. The main area is titled 'Creating the Role Hierarchy' and shows a tree view of roles. At the top level is 'Malla Reddy University'. Under it are 'CEO', 'COO', 'Marketing', 'Receptionist', 'SVP, Customer Service & Support', 'Customer Support, International', 'Customer Support, North America', and 'Installation & Repair Services'. Each role has 'Edit | Del | Assign' options. A button 'Add Role' is available at each level.

8.2 Receptionist Role

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

The screenshot shows the 'Role Edit' page for the 'Receptionist' role. The 'Label' field is filled with 'Receptionist'. The 'Role Name' field also contains 'Receptionist'. In the 'This role reports to' dropdown, 'CEO' is selected. There is a note below the fields stating 'Role Name as displayed on reports'. At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons.

TASK9: 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.

9.1 Create User

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

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar is collapsed, and the main area displays the 'User Detail' for a user named 'sandeep gujja'. The 'User Detail' section includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Manager, and various checkboxes for roles like CEO, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts. The 'Role' field is set to 'CEO', and the 'User License' field is set to 'Salesforce'. The 'Profile' field is set to 'Custom User'. The 'Active' checkbox is checked. The 'Email' field contains 'talakantradhika123@gmail.com' with a 'Verify' link. The 'Username' field contains 'sgujja@sgujja.com'. The 'Nickname' field contains 'sunny'. The 'Title' field is empty. The 'Company' field is empty. The 'Department' field is empty. The 'Division' field is empty. The 'Address' field is empty. The 'Time Zone' field shows '(GMT +05:30) India Standard Time (Asia/Kolkata)'. The 'Locale' field shows 'English (India)'. The 'Language' field shows 'English'. The 'Delegated Approver' field is empty. The 'Manager' field is empty. The 'Receive Approval Request Emails' field shows 'Only if I am an approver'. The 'Federation ID' field is empty. The 'Sharing' button is visible at the top of the detail page.

9.2 Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Abhilash
 - Last Name : garapati
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id

- Username : Username should be in this form: text@text.com
- Nick Name : Give a Nickname
- Role : Marketing
- User licence: Salesforce platform
- Profiles : Custom Platform User1

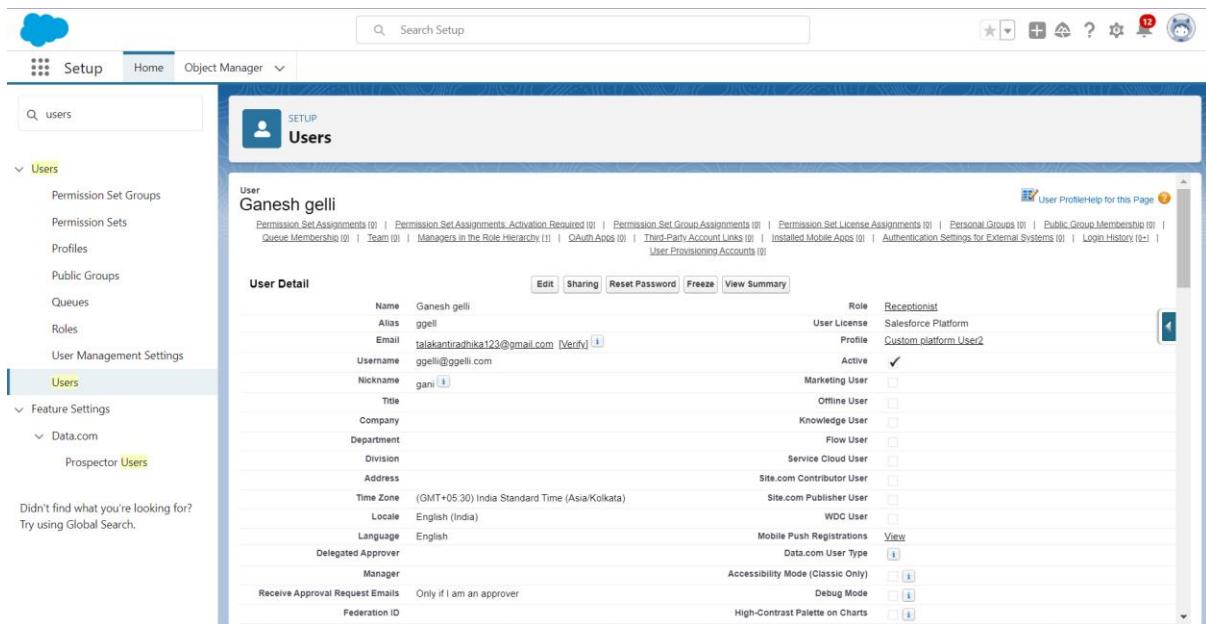
3. save

User Detail

Name	Abhilash garapati	Role	Marketing
Alias	agar	User License	Salesforce Platform
Email	talakantradhika123@gmail.com	Profile	Custom Platform User1
Username	agarapati@agarapati.com	Active	<input checked="" type="checkbox"/>
Nickname	abhi	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>

9.3 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

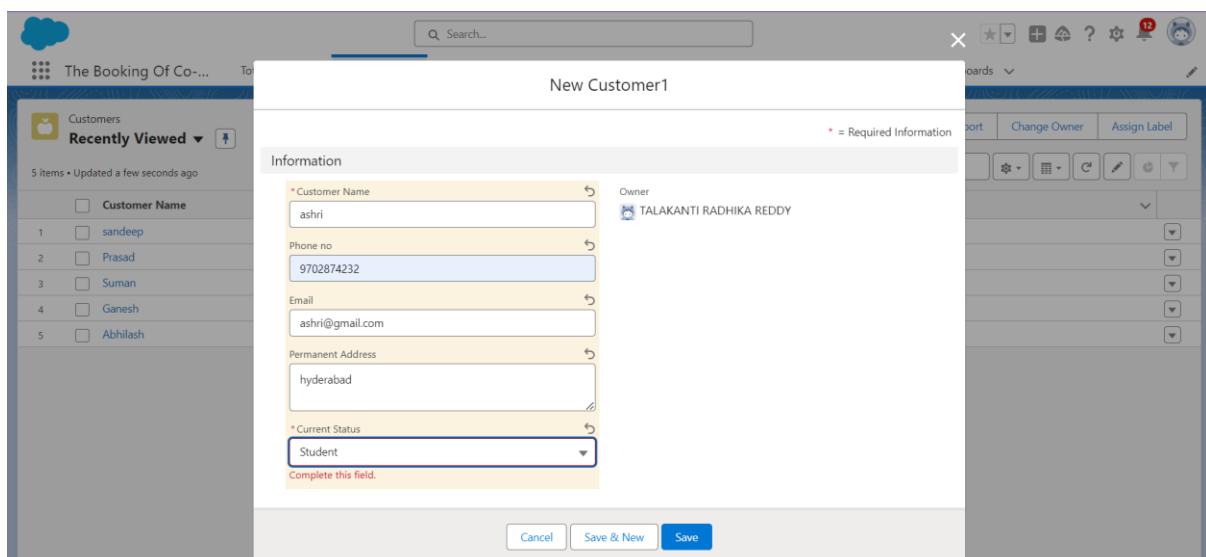


3. Save

TASK10: User Adoption

10.1 Create a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search The Booking Of Co-Living & click on it.
3. Click on the Customers Tab.
4. Click new and fill details & Save



10.2 View a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search The Booking Of Co-Living & 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 Salesforce interface for a customer record. At the top, there's a navigation bar with tabs like 'Total Rooms', 'Customers', 'Room Bookings', etc. Below the navigation is a search bar and a toolbar with icons for 'New Contact', 'Edit', and 'New Opportunity'. The main area displays a customer record for 'Customer1 sandeep'. The record includes fields for 'Customer Name' (sandeep), 'Phone no' (9702874232), 'Email' (sandeep@gmail.com), 'Permanent Address' (Hyderabad), 'Current Status' (Employee), and ownership information ('Owner' TALAKANTI RADHIKA REDDY). It also shows the creation and last modification details by the same user.

10.3 Delete a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search The Booking Of Co-Living & 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.

This screenshot shows the Salesforce customer list view. At the top, there's a search bar and a toolbar with icons for 'New', 'Import', 'Change Owner', and 'Assign Label'. The main area shows a list titled 'Recently Viewed' with 5 items updated a few seconds ago. The list includes names: sandeep, Prasad, Suman, Ganesh, and Abhilash. On the right side of the list, there's a context menu with options like 'Edit', 'Delete', 'Change Owner', and 'Edit Labels'. A tooltip for 'Delete' is visible.

TASK11: 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

11.1 Create Report

1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel “Customers with Room Bookings with Total Rooms” > click on start report.
4. Customize your report
5. Add fields from left pane as shown below
6. Save or run it.

The screenshot shows the Salesforce Object Manager interface for the 'Room Booking' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a validation rule named 'check_in_rule'. The rule details are as follows:

Validation Rule Detail	
Rule Name	check_in_rule
Error Condition Formula	Check_in__c = false
Error Message	Check box should be checked
Description	
Created By	TALAKANTI RADHIKA REDDY, 28/07/2024, 6:25 pm
Modified By	TALAKANTI RADHIKA REDDY, 28/07/2024, 6:25 pm

11.2 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.

The screenshot shows a report titled "Room booking report" with the subtitle "Report: Customers with Room Bookings and Total Rooms". The report displays data for 7 customers, each with their name, room booking details, permanent address, current status, room sharing, advance payment for 1 month, AC-3000, and amount. The total amount is ₹1,26,000.

Customer Name	Room Booking: Room No	Phone no	Email	Permanent Address	Current Status	Room Sharing	Advance Payment for 1 Month	AC-3000	Amount
Abhilash	RN-004	9702874876	abhilash@gmail.com	Hyderabad	Employee	Single sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹70.00
Subtotal							1	1	₹70.00
Ganesh	RN-005	9706774876	ganesh@gmail.com	Chennai	Others	Double sharing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹3.50
Subtotal							1	0	₹3.50
Prasad	RN-001	9703874232	prasad@gmail.com	Hyderabad	Employee	Double sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹6.00
	RN-007	9703874232	prasad@gmail.com	Hyderabad	Employee	Double sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹30.00
Subtotal							2	2	₹36.00
sandeep	RN-003	9702874232	sandeep@gmail.com	Hyderabad	Employee	Triple sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹5.00
	RN-006	9702874232	sandeep@gmail.com	Hyderabad	Employee	Triple sharing	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	₹7.50
Subtotal							2	2	₹12.50
Suman	RN-002	8602874232	suman@gmail.com	Bangalore	Student	Single sharing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	₹4.00
Subtotal							1	0	₹4.00
Total							7	5	₹1,26,00

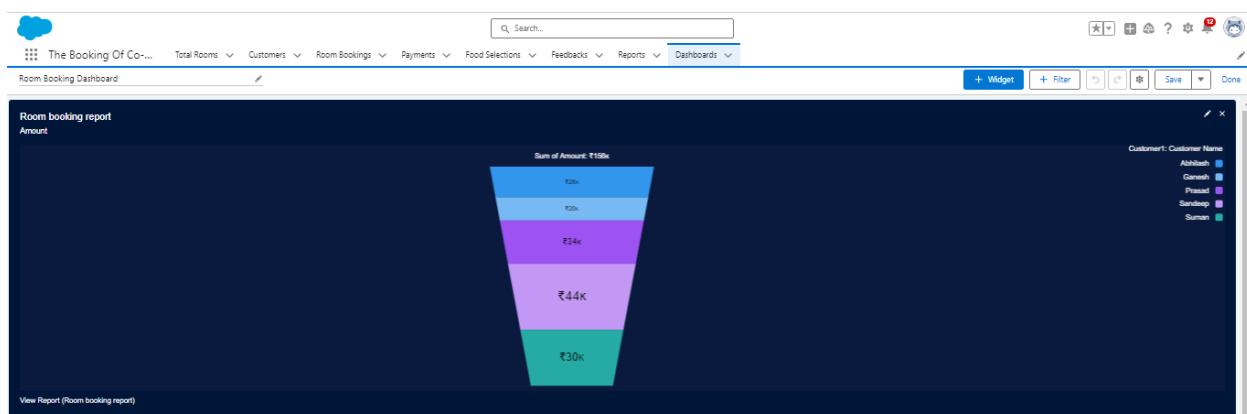
Row Counts: Detail Rows: Subtotals: Grand Total:

Taks12: 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.

12.1 Create Dashboard

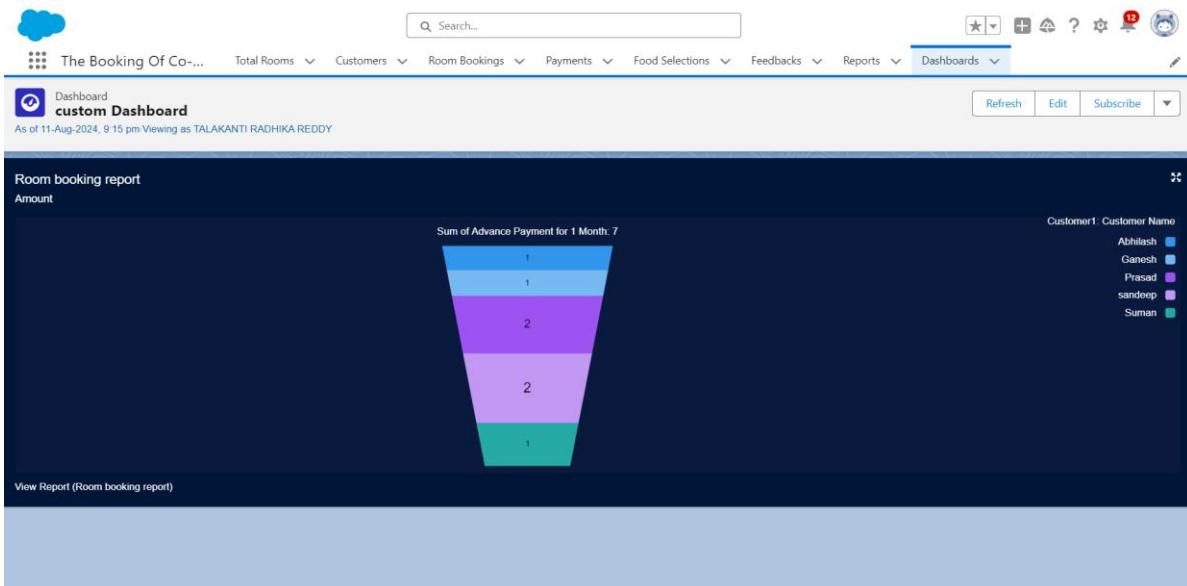
1. Go to the app > click on the Dashboard tabs and click on new Dashboard
2. Give a Name and click on Create.
3. Select add component.
4. Select a Report Customer with Room Booking and click on select.
5. Click Add then click on Save and then click on Done.



12.2 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.

13.1. Create a Flow

1. Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as a Room Booking in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.
7. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
8. Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Single sharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on “+” Symbol In the Outcome Order.
9. Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.

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

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

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

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

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

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

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

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

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

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

15. Enter the update records details

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

16. Enter the update records details

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

17. Enter the update records details

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

18. Enter the update records details

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

19. Enter the update records details

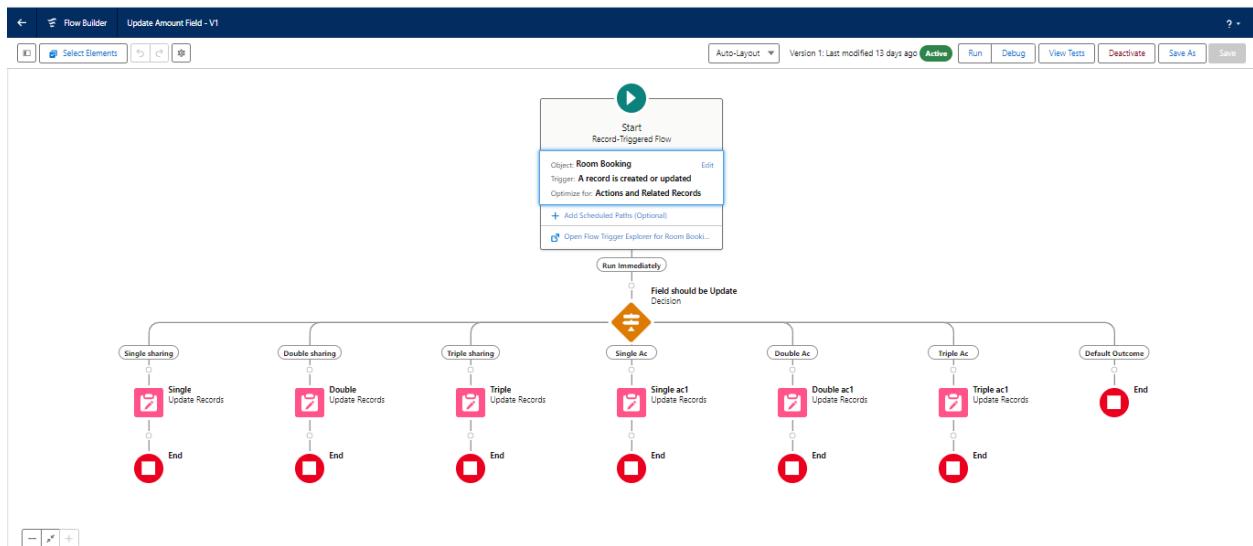
- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click on Done.

20. Enter the update records details

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

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

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



13.2. Test the Flow

1. Go to App Launcher and search for The Booking of 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

Information

* = Required Information

Room No

- Room Sharing: Single sharing
- Name: Prasad
- AC-3000:
- Advance Payment for 1 Month:

Amount:

Total No Of Rooms: 5

Check in: Check Out:

Buttons: Cancel, Save & New, Save

The screenshot shows a CRM application interface for managing room bookings. The main title bar says "The Booking Of Co-...". The top navigation bar includes "Total Rooms", "Customers", "Room Bookings" (selected), "Payments", "Food Selections", "Feedbacks", "Reports", and "Dashboards". On the right, there are icons for search, refresh, help, and notifications. Below the navigation, a sub-header says "Room Booking RN-008" and includes "New Contact", "Edit", and "New Opportunity" buttons.

Related Details

Room No	RN-008
Room Sharing	Single sharing
Name	Prasad
AC-3000	AC-3000
<input checked="" type="checkbox"/>	Advance Payment for 1 Month
<input checked="" type="checkbox"/>	Amount
₹34,000	Total No Of Rooms
5	Rooms Available
27	Check in
<input checked="" type="checkbox"/>	Check Out
Created By: TALAKANTI RADHIKA REDDY, 11/08/2024, 9:17 pm	
Last Modified By: TALAKANTI RADHIKA REDDY, 11/08/2024, 9:17 pm	

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

Conclusion

The Co-Living Space project effectively delivers a comprehensive CRM platform tailored for managing the various aspects of a co-living environment. The application streamlines room selection, personalized meal planning, payment processing, and service feedback, making it easier for residents to manage their stay while enhancing their overall living experience.

By fostering community interaction and encouraging shared responsibility, the platform not only promotes a sense of belonging but also ensures that residents' needs are promptly addressed. This project successfully combines convenience, comfort, and community, providing a well-rounded solution for modern co-living spaces.