

A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING



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PROJECT ABSTRACT :

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

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

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TASK 1-Salesforce

Introduction:

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

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

What Is Salesforce?

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

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

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

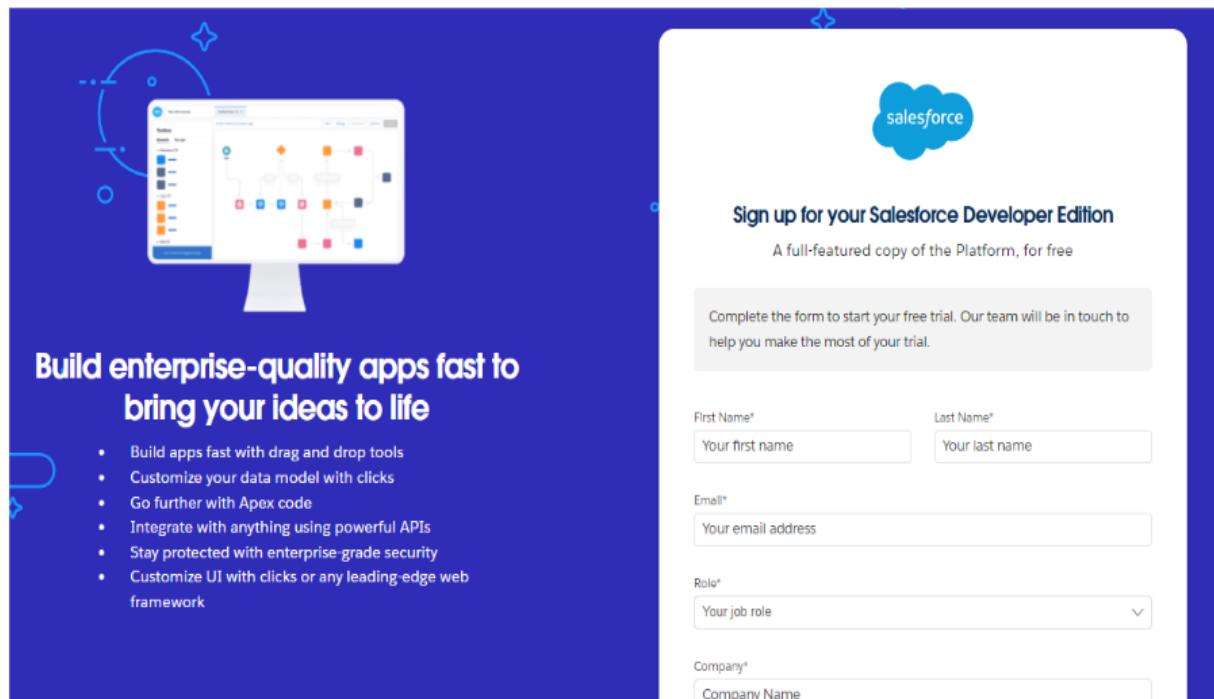
<https://youtu.be/r9EX3lGde5k>

Activity1- Creating Developer Account

Creating a developer org in salesforce.

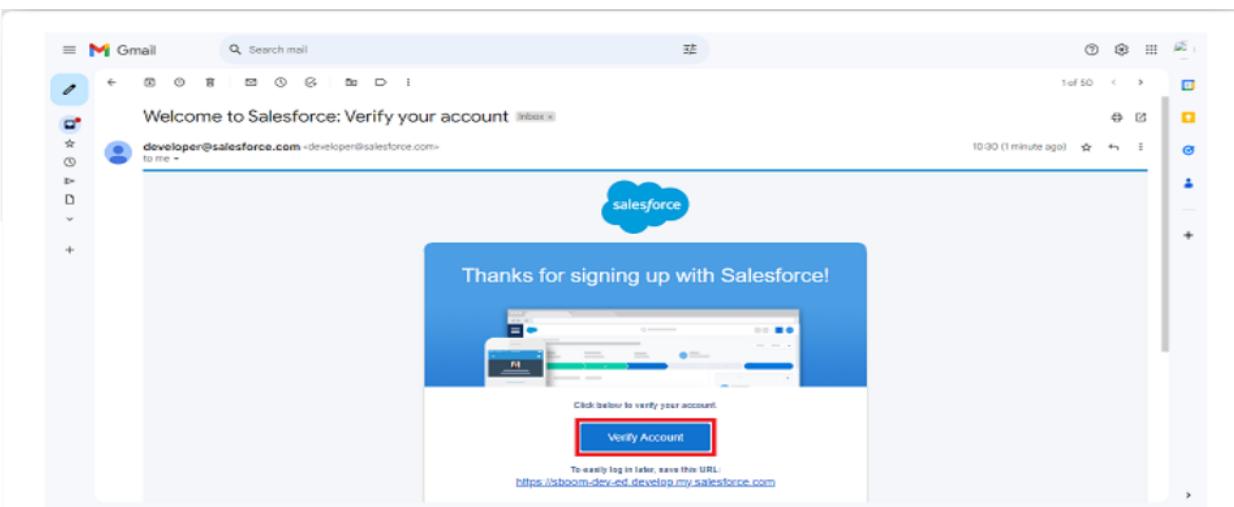
1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
 1. First name & Last name

1. Email
2. Role : Developer
3. Company : College Name
4. County : India
5. Postal Code : pin code



Activity2- 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.

A screenshot of a "Change Your Password" page. It asks for a new password for lead@sb.com, specifying it must be at least 8 characters long, containing one letter and one number. The "New Password" and "Confirm New Password" fields are highlighted with a red box. Below them is a "Security Question" field with the question "In what city were you born?" and an "Answer" field containing "asdfghjkl", which is also highlighted with a red box. At the bottom is a "Change Password" button.

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

Task2 – 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:

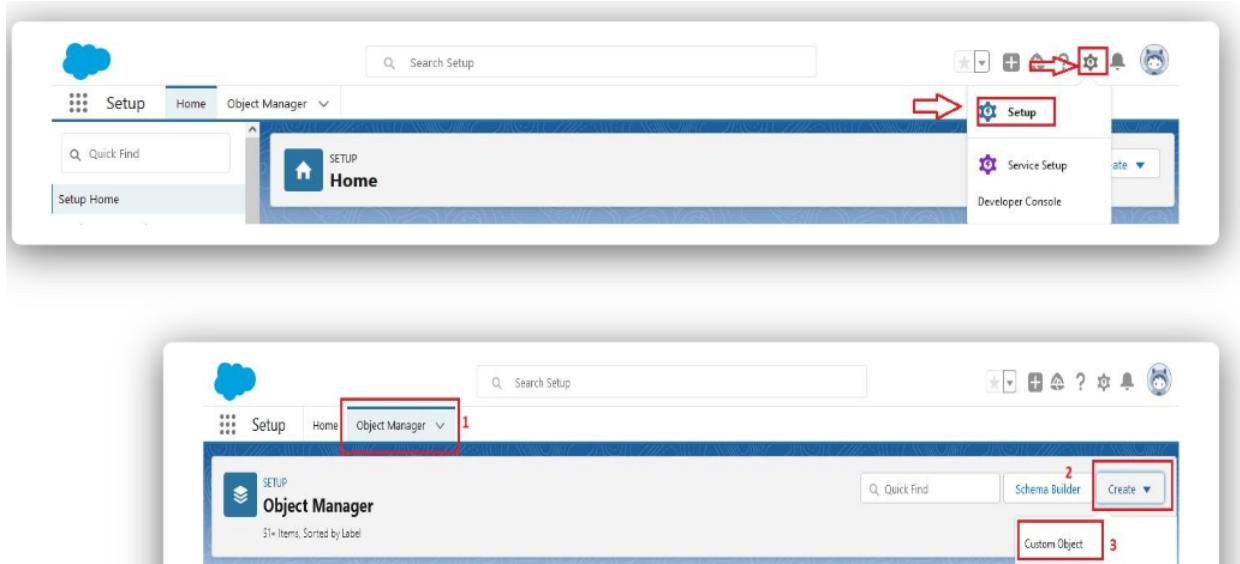
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

Activity1 - Create a custom object for Total Rooms

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.

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in lists, menus, reports, and reports.

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

Starts with vowel sound:

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

Object Name	Total_Rooms	Example: Account
-------------	-------------	------------------

Description:

Contact Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Context Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, reports, lists, details, 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
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Data Type:

Optional Features

- Allow Reports
- Allow Bulk API Access
- Track Field History
- Allow Case Comments
- 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 Bulk API Access
- Allow Case Comments
- Allow Reports

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

Buttons: Save | Save & New | Cancel

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

Activity2- Create a custom object for Customer

To create a custom object, follow these steps:

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

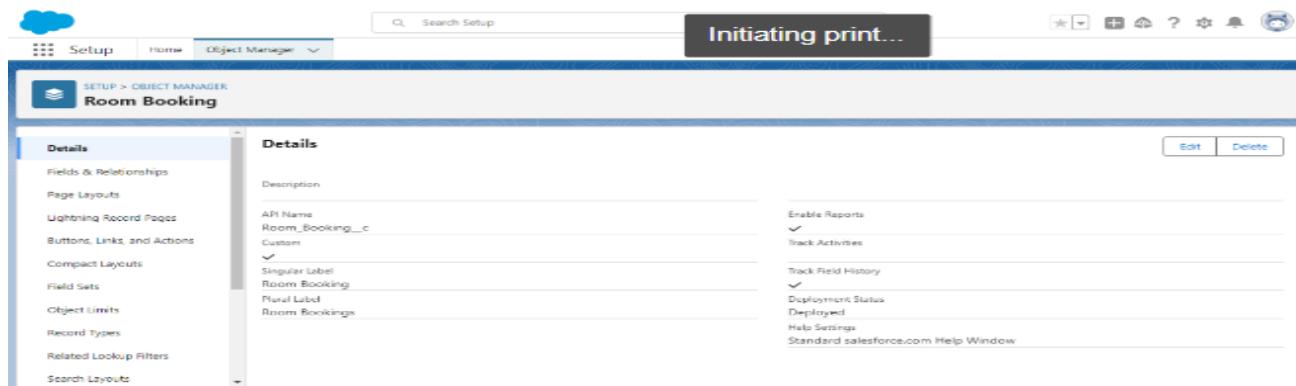
3. Fill in the label as " Customer1 ".
4. Fill in the plural label as " Customers ".
5. Record name: "Customer Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.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

Activity3- Create a custom object for Room Booking

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Room Booking ".
4. Fill in the plural label as " Room Bookings ".
5. Record name: "Room No "
6. Select the data type as "Auto number ".

7. Under Display format enter RN-{000}
8. Enter starting Number as 1
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

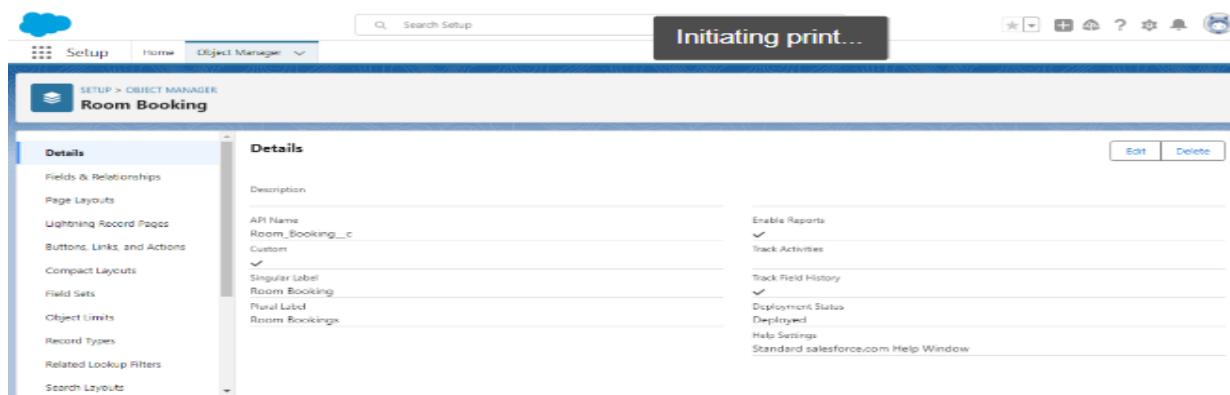


Activity4 - Create a custom object for Payment

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Payment1".
4. Fill in the plural label as " Payments ".

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



Activity5 -Create a custom object for Food Selection

To create a custom object, follow these steps:

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

3. Fill in the label as " Food Selection ".
4. Record name: " Food Selection No "
5. Select the data type as "Auto number ".
6. Under Display format enter FS No-{000}
7. Enter starting Number as 1
8. In the Optional Features section, select Allow Reports and Track Field History.
9. Fill in the plural label as " Food Selections ".
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

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

Types of Tabs:

1. Custom Tabs

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

2.Web Tabs

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

3.Visualforce Tabs

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

4.Lightning Component Tabs

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

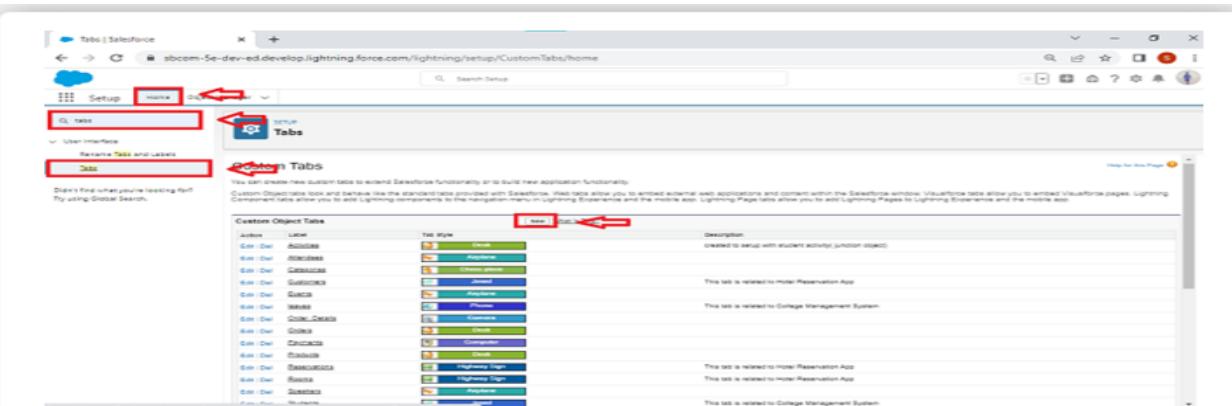
5.Lightning Page Tabs

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

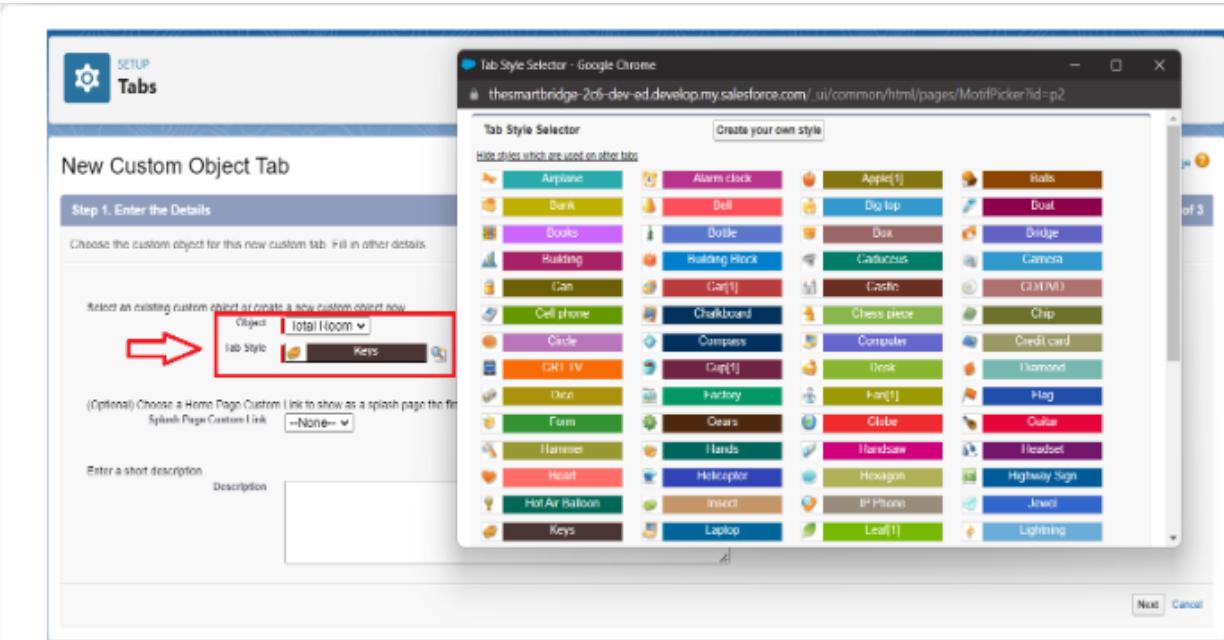
Activity1- Creating a Tab for Total Rooms

To create a Tab:(Total Rooms)

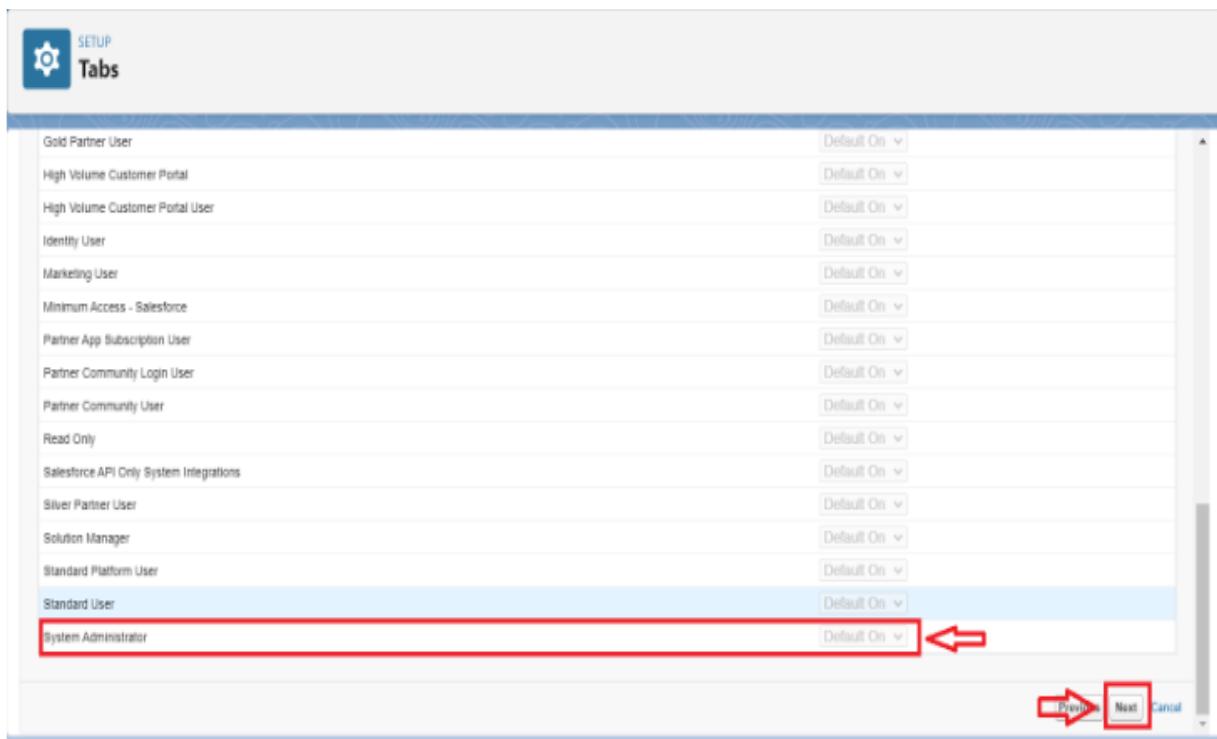
1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)



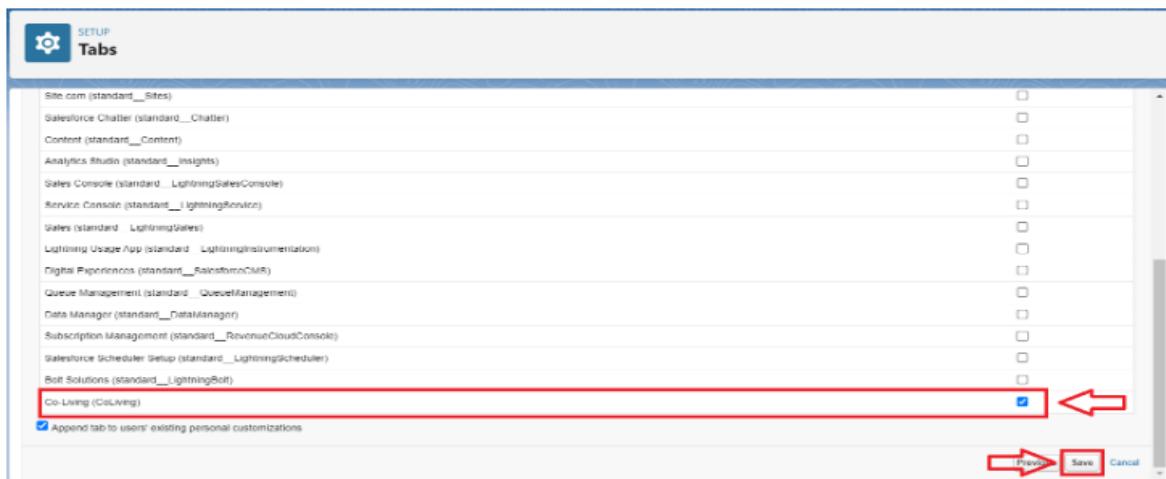
2. Select Object(Total Rooms) > Select the tab style.



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



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



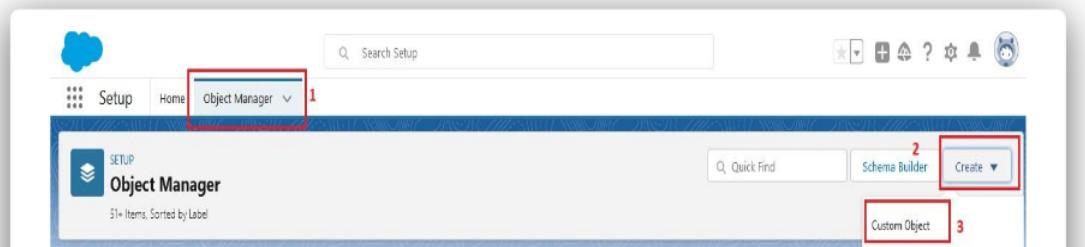
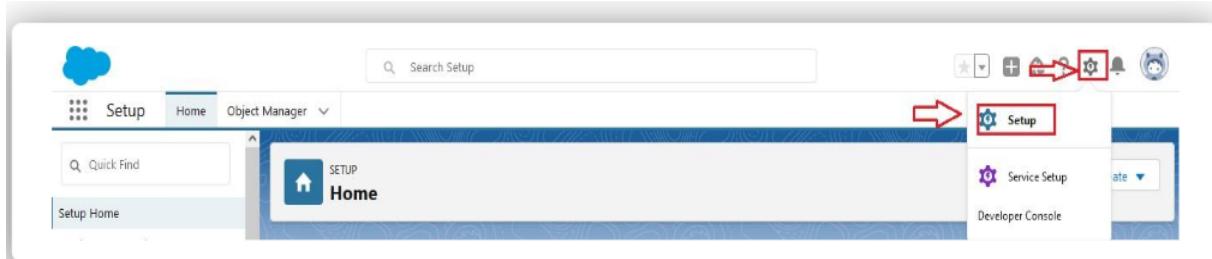
Activity2- Create a Tab for Customers

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.



Activity3- 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.

Activity4- Create a Tabs For Remaining Objects

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

Task-4 The Lightning App

Introduction:

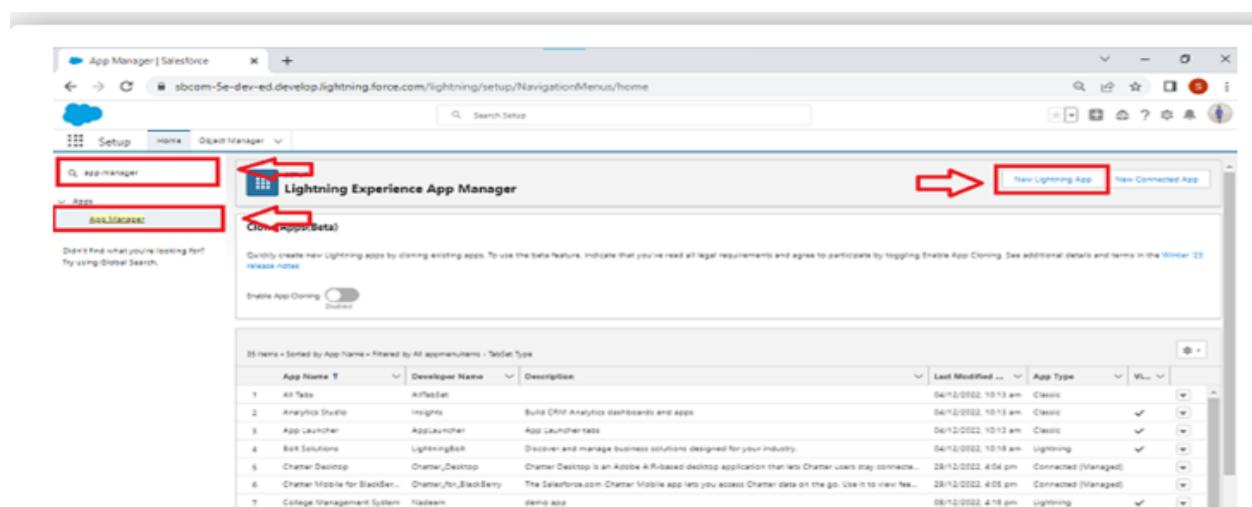
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

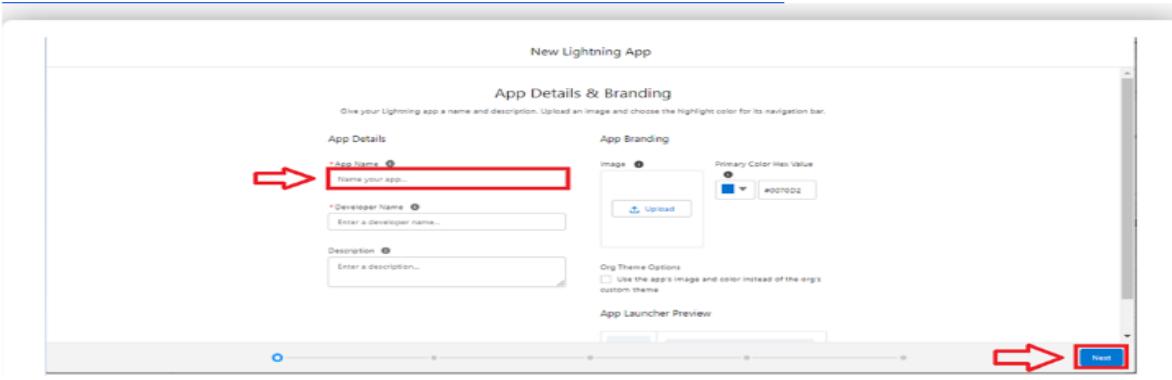
Activity1- Create a Lightning App

To create a lightning app page:

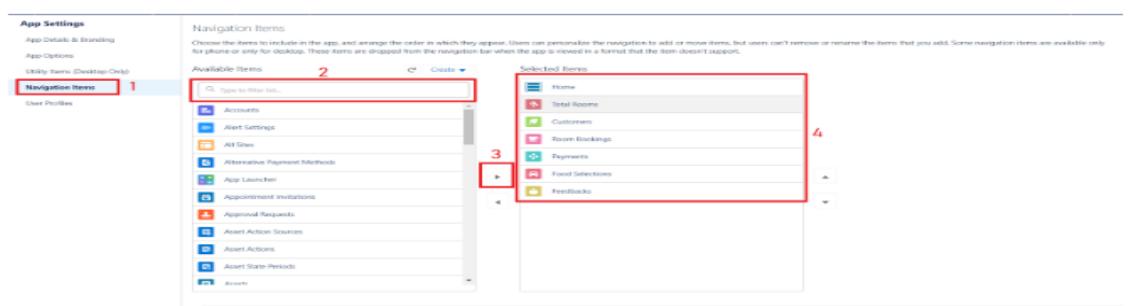
1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.



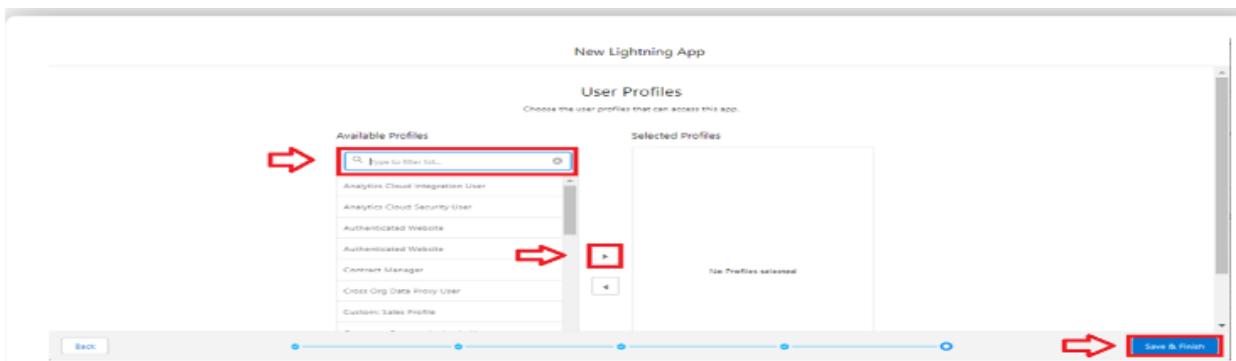
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



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.

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.

Activity1 - Creation of fields for the customer1 object

1. To create fields in an object:

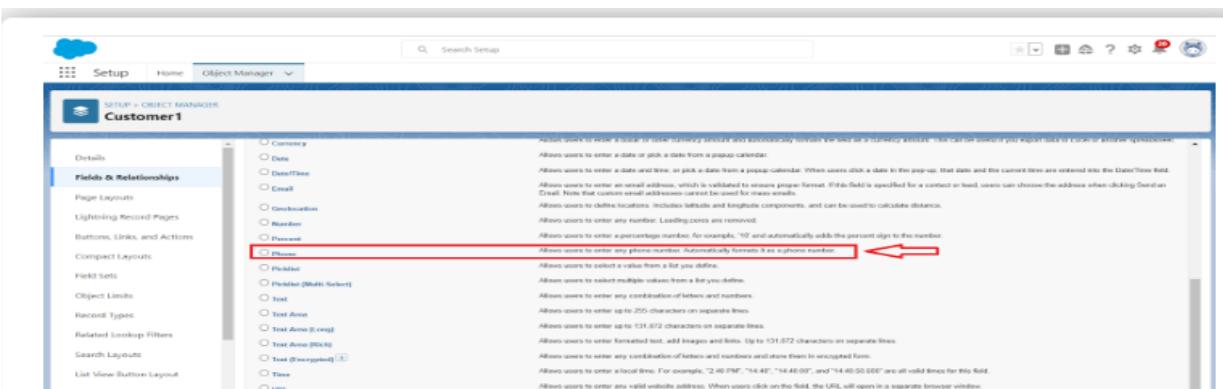
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. Below the navigation is a toolbar with icons for 'Quick Find', 'Schema Builder', and 'Create'. The main area displays a list of objects with their names, labels, and types. The 'Customer1' object is highlighted with a red box and has a red arrow pointing to its creation date field ('Created Date').

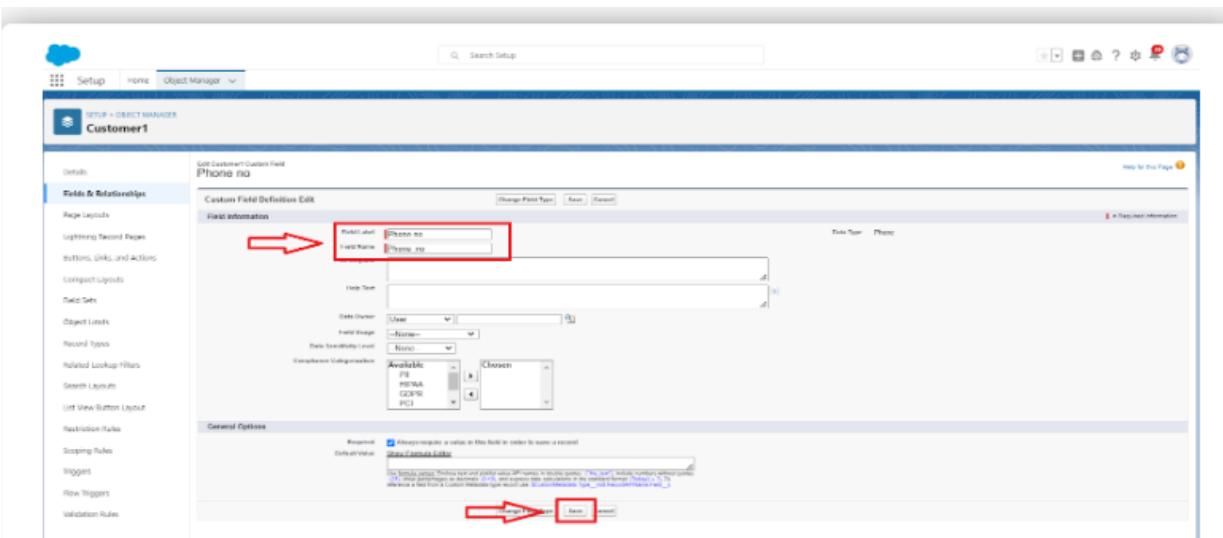
2. Now click on “Fields & Relationships” > New

The screenshot shows the 'Fields & Relationships' page for the 'Customer1' object. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. Below the navigation is a toolbar with icons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set Primary Tracking'. The left sidebar lists various object settings like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', etc. The main area displays a table of existing fields with columns for 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. A red box highlights the 'Fields & Relationships' link in the sidebar, and another red box highlights the 'New' button in the toolbar.

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.

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

1. Select Data type as a “Email” and Click on Next

2. 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.

Activity2 - Creation of fields for the Room Booking object

1. To create fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. A red arrow points to the 'Object Manager' tab at the top. Another red arrow points to the 'Room Booking' row in the list, which is highlighted with a red box. The 'Room Booking' row contains the fields: Room Booking, Room_booking__c, Custom Object, and a date field set to 07/06/2022.

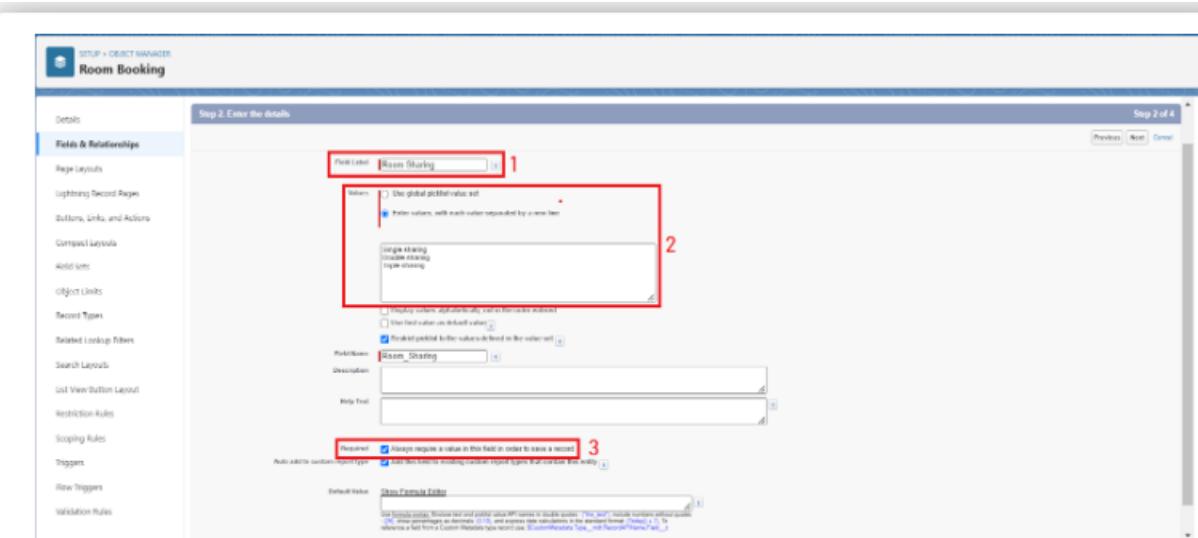
2. Now click on “Fields & Relationships” > New

The screenshot shows the 'Fields & Relationships' page for the Room Booking object. A red arrow points to the 'Room Booking' label at the top. Another red arrow points to the 'New' button at the top right of the table header. The table lists several fields: AE__0000, AE__c, Advance_payment_for_1month, Advance_payment_for_1month_c, Amount, and Created_By.

3. Select Data Type as a “Picklist”

The screenshot shows the 'Fields & Relationships' page for the Room Booking object. A red arrow points to the 'Fields & Relationships' tab at the top. Another red arrow points to the 'Picklist' data type option in the list of available types. The 'Picklist' section includes a note: "Allows users to select a value from a list you define".

4. Click on Next



5. Fill the Above as following:

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

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

To create fields & relationship to an object:

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A red arrow points to the 'Room Booking' object in the list, which is highlighted with a red border. Another red arrow points to the 'Edit' button in the top right corner of the object's row.

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

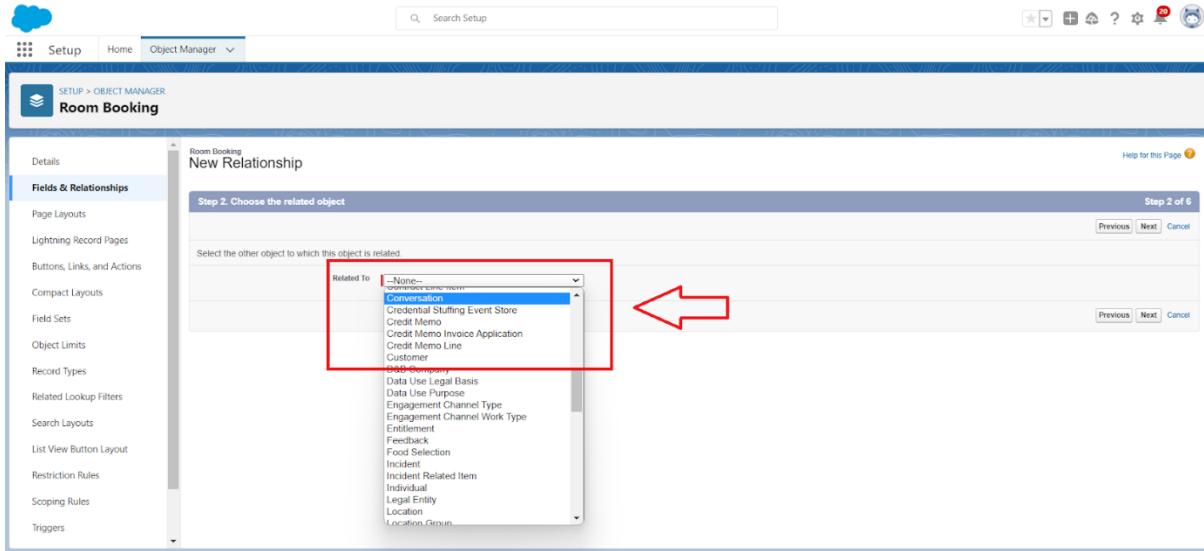
The screenshot shows the 'Room Booking' object's 'Fields & Relationships' page. A red arrow points to the 'Room Booking' object in the top left. Another red arrow points to the 'New' button in the top right. The table lists several fields: 'At' (checkbox), 'Advance payment for 1month' (checkbox), 'Amount' (Currency), and 'Created By' (Lookup). The 'FIELD NAME' column shows the suffix '_c' for most fields.

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

4. Click on Next

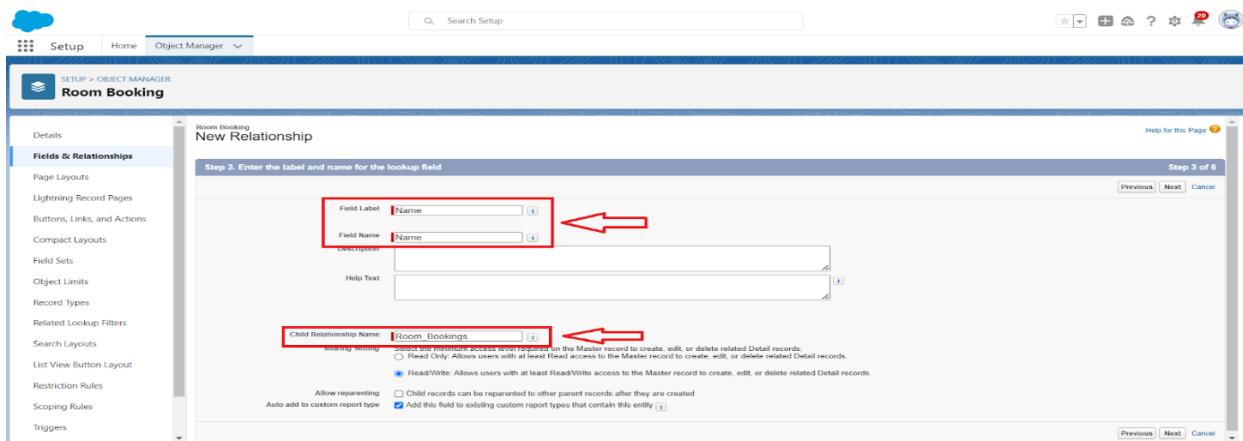
The screenshot shows the 'Create Custom Field' wizard, Step 2: Set Data Type. A red arrow points to the 'Room Booking' object in the top left. Another red arrow points to the 'Master-Detail Relationship' option in the 'Data Type' section. A third red arrow points to the 'Next Step' button in the bottom right.

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

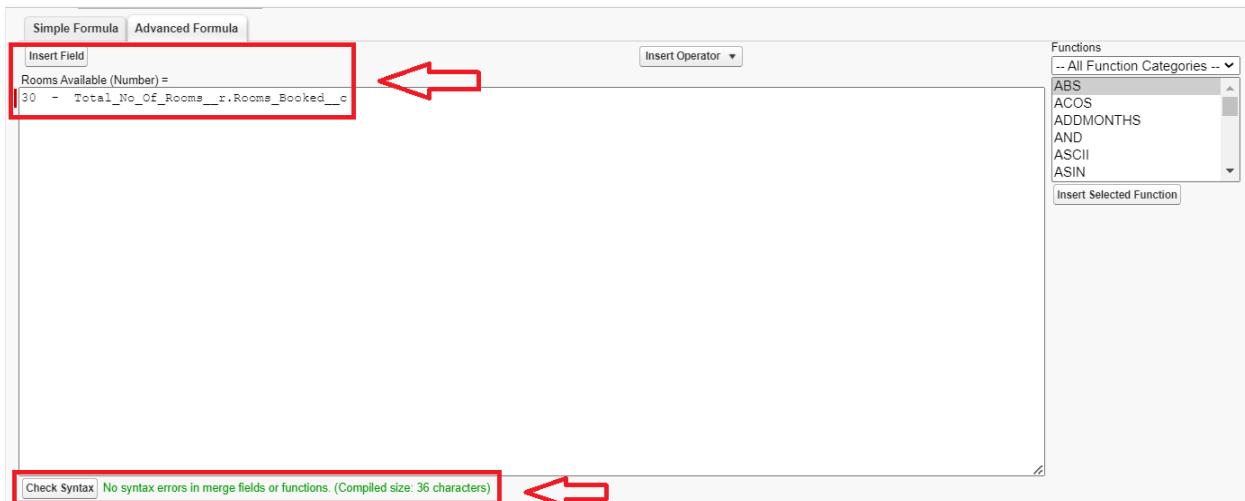
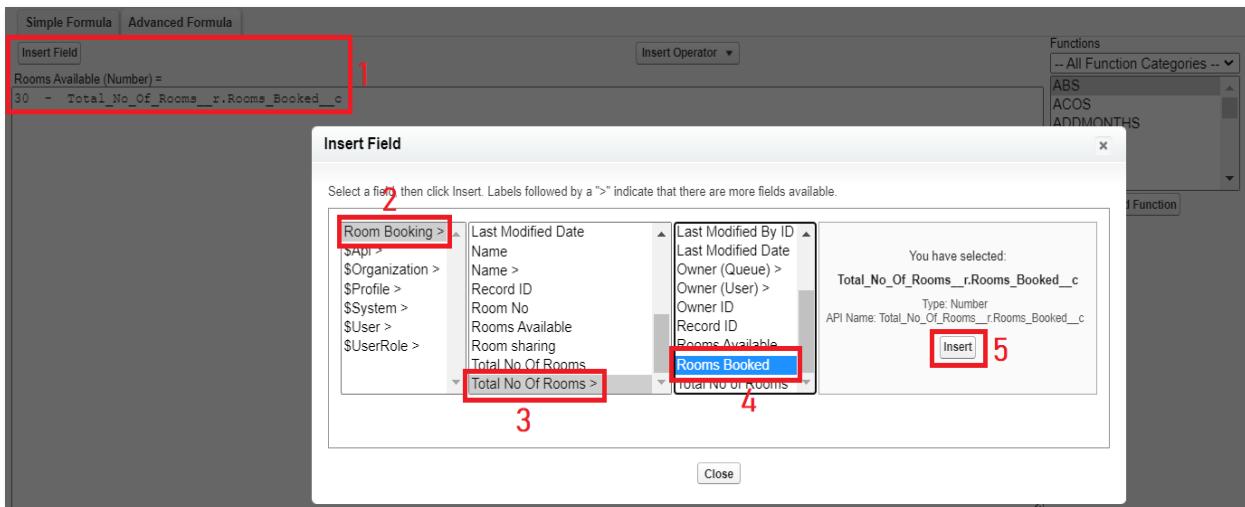
6. Select the count Radio button in the select Roll-up Type

The screenshot shows the 'Step 3. Define the summary calculation' page. At the top, it says 'Total Room New Custom Field'. On the right, there are 'Previous', 'Next', and 'Cancel' buttons. The main area has a header 'Step 3 of 5' and a note '= Required Information'. It includes sections for 'Select Object to Summarize' (Master Object: Total Room, Summarized Object: Room Bookings), 'Select Roll-Up Type' (radio buttons for COUNT, SUM, MIN, MAX, with COUNT selected), and 'Filter Criteria' (checkboxes for 'All records should be included in the calculation' and 'Only records meeting certain criteria should be included in the calculation').

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

Activity3 - 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.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with tabs for Setup, Home, and Object Manager. The 'Object Manager' tab is highlighted with a red box and has a red arrow pointing to it from the left. Below the navigation bar, there's a search bar labeled 'Search Setup'. On the right side of the header, there are several icons. The main area is a list of objects, each with three columns: Name, API Name, and Object Type. The 'Payment1' object is highlighted with a red box and has a red arrow pointing to its last modification date ('06/06/2023') in the fourth column. Other objects listed include Party Consent, Payment, 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.

Name	API Name	Object Type	Last Modified
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

SETUP > OBJECT MANAGER

Payment1

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

Master-Detail Relationship

Next

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

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 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.

4. Click on Next

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

The image consists of two screenshots of the Salesforce Object Manager interface. Both screenshots show the 'Payment1' object being edited.

Screenshot 1: Step 2. Choose the related object

- The 'Fields & Relationships' tab is selected in the sidebar.
- The 'New Relationship' button is clicked.
- The 'Related To' dropdown menu is open, showing various objects like Credit Memo Line, Customer, D&B Company, etc. A red box highlights this dropdown.
- A red arrow points from the bottom right towards the 'Related To' dropdown.

Screenshot 2: Step 3. Enter the label and name for the lookup field

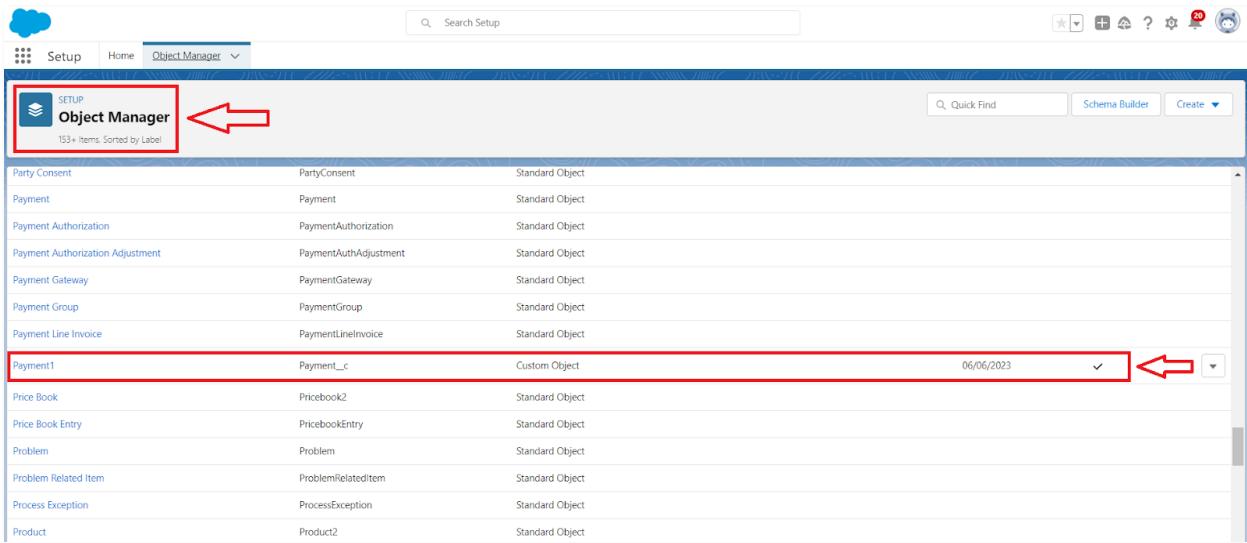
- The 'Fields & Relationships' tab is selected in the sidebar.
- The 'New Relationship' button is clicked.
- The 'Field Label' field contains 'Name' (highlighted by a red box).
- The 'Field Name' field contains 'Name' (highlighted by a red box).
- The 'Child Relationship Name' field contains 'Payments1' (highlighted by a red box).
- A red arrow points from the bottom right towards the 'Field Label' field.

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.

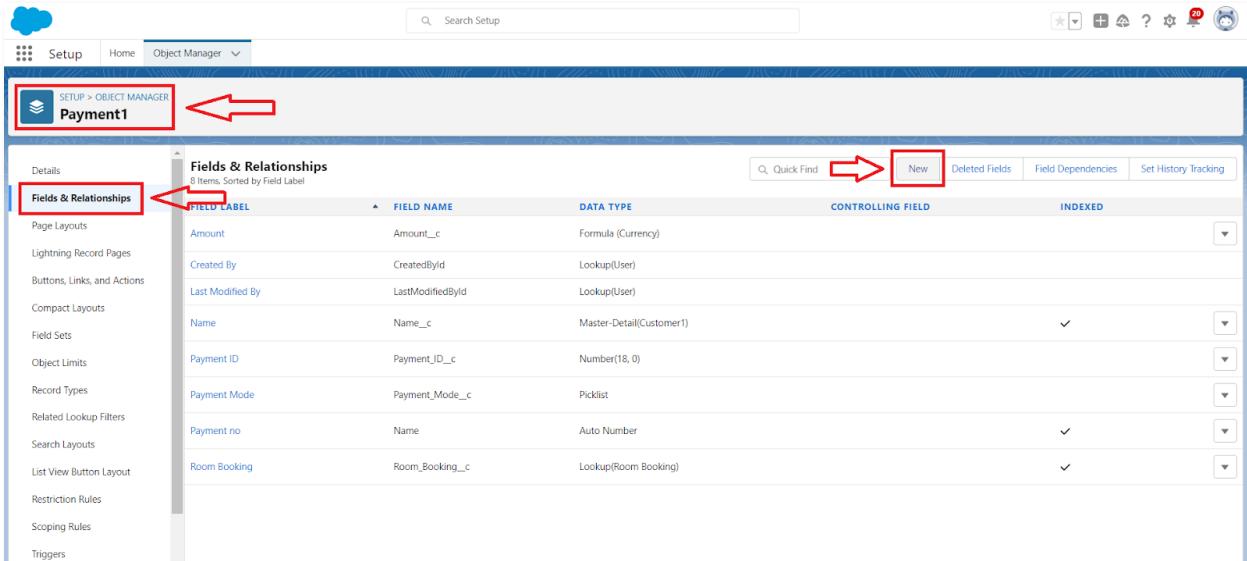
2. To create another fields & relationship to an object:

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



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

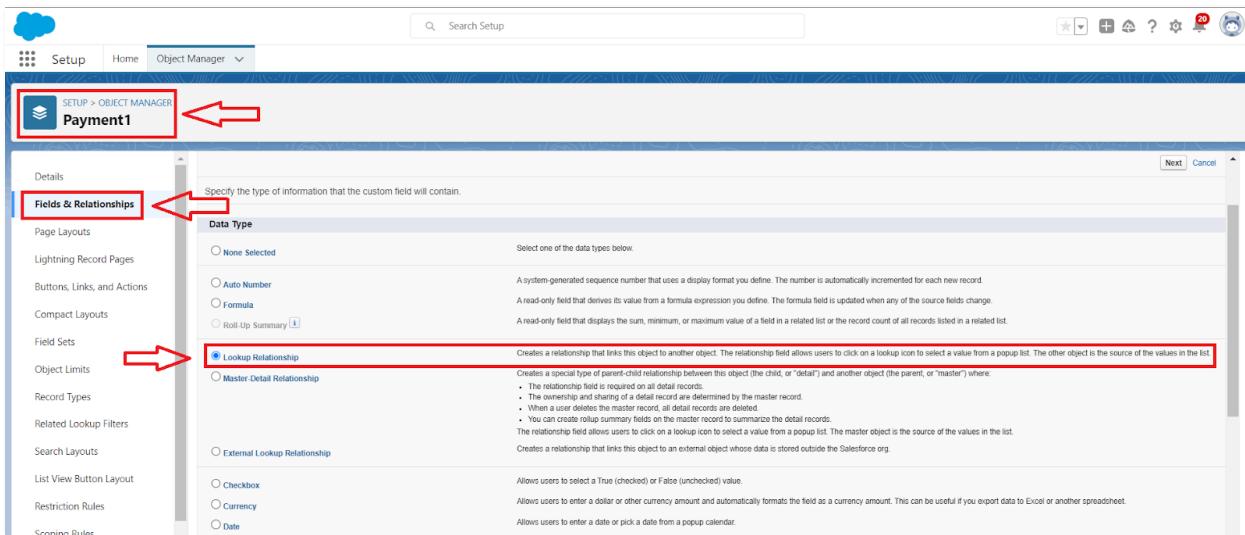
2. Now click on “Fields & Relationships” > New



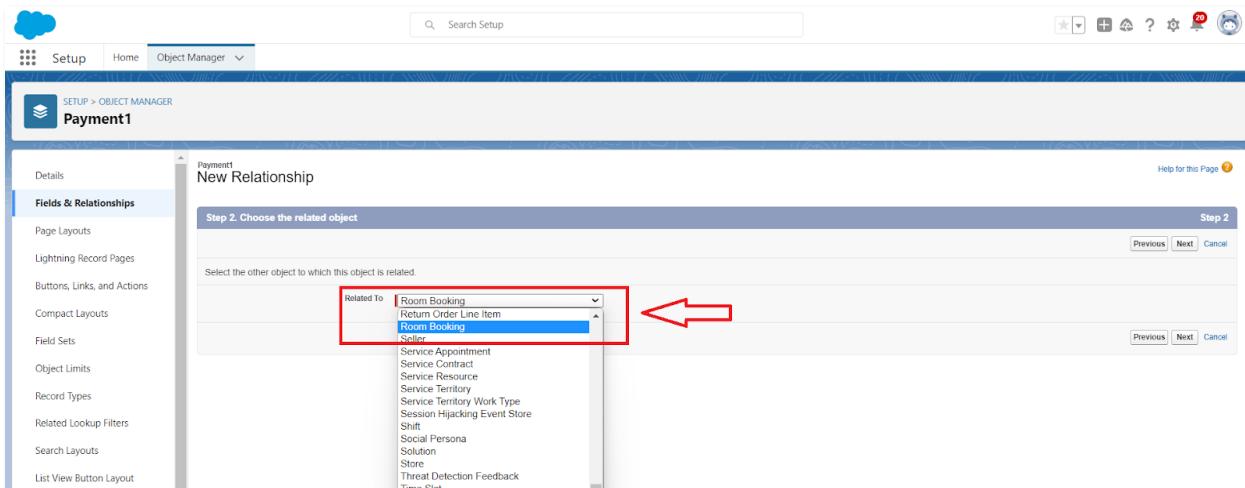
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Master-Detail(Customer)		
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist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

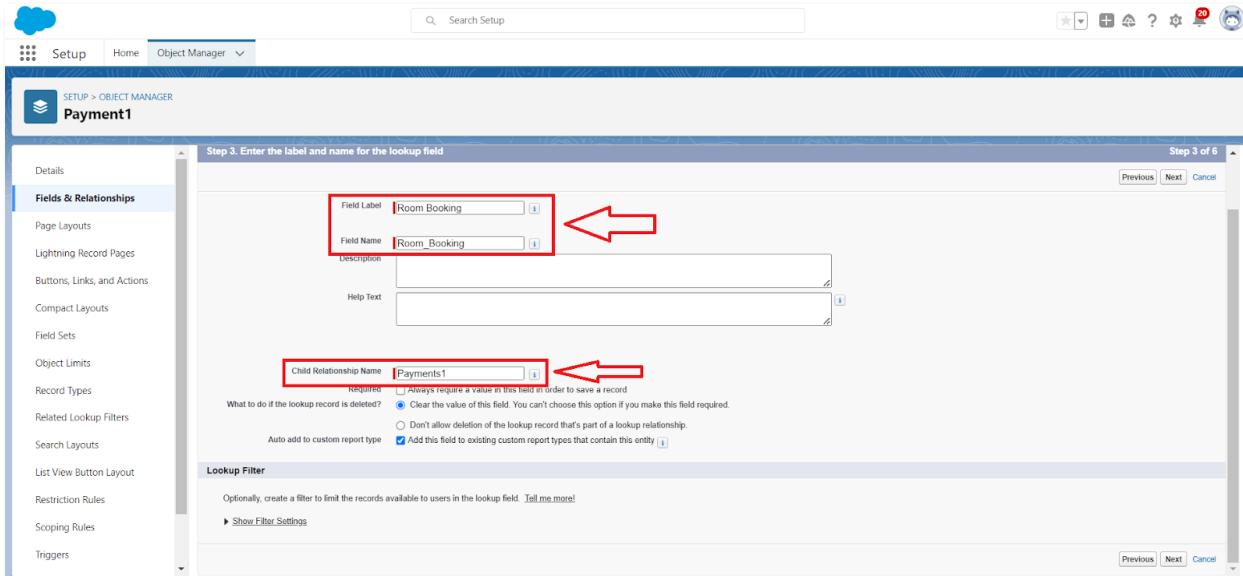
3. Select Data Type as a “Lookup Relationship”

4. Click on Next



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





6. Fill the Above as following:

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

3. Creation of another fields for the Payment1 object

To create fields in an object:

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

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	

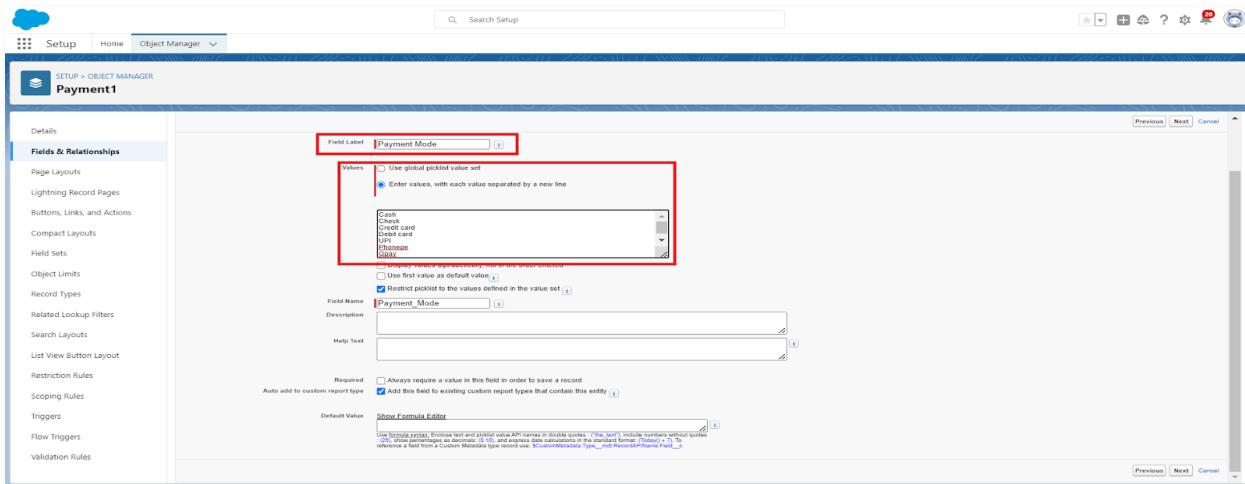
2. Now click on “Fields & Relationships” > New

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	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 “Picklist”

DATA TYPES

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



4. Fill the Above as following:

- Field Label: Payment Mode
- Value - Select enter values with each value separated by a new line
 1. Cash
 2. Check
 3. Credit card
 4. Debit card
 5. UPI
 6. Phonepe
 7. Gpay
 8. Paytm
- Select required
- Click on Next > Next > Save and new.

Cross Object Formula Field:

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

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

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

4. Create a Cross object formula Field in Payment1 Object

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains 'Search Setup'. Below the header, there's a 'Quick Find' bar with 'Schema Builder' and a 'Create' button. The main area displays a list of objects with columns for Name, Label, and Type. The 'Payment1' object is highlighted with a red box and has its details shown in the bottom right corner: Type 'Custom Object', Last Modified '06/06/2023', and a dropdown menu. A red arrow points to this dropdown menu.

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

The screenshot shows the 'Fields & Relationships' page for the 'Payment1' object. The top navigation bar shows 'SETUP > OBJECT MANAGER' and 'Payment1'. A red box highlights the 'Fields & Relationships' link in the left sidebar, and a red arrow points to it. Another red box highlights the 'New' button in the top right of the main grid, and a red arrow points to it. The main grid lists various fields with columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. Each row shows a different field like 'Amount', 'Created By', etc., with their respective details.

3. Select Data Type as a “Formula”

4. Click on Next

SETUP > OBJECT MANAGER
Payment1

Details
Fields & Relationships

Data Type

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

- 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 master record is deleted, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.
- The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

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

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

SETUP > OBJECT MANAGER
Payment1

Details
Fields & Relationships

Field Label Field Name

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

Formula Return Type

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

Calculate a boolean value
Example: `ISNULL(Price)`

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `(Gross Margin + Amount) - Cost_c`

Calculate a date, for example, by adding or subtracting days to other dates.
Example: `OpportunityCloseDate - 7`

Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: `Net = NOW() + 1`

Calculate a numeric value.
Example: `Fahrenheit = 1.8 * Celsius_c + 32`

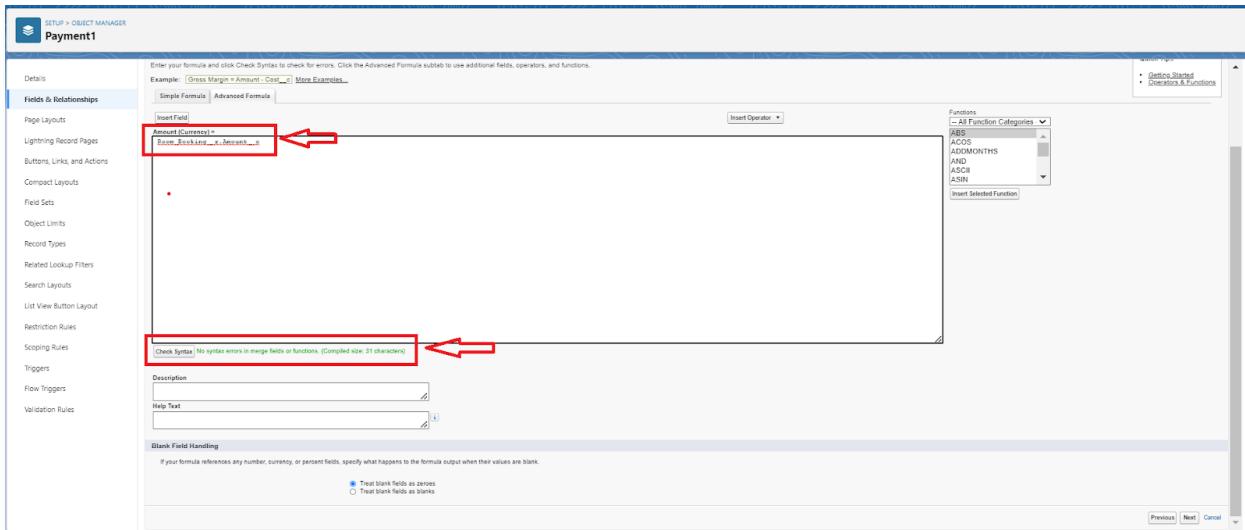
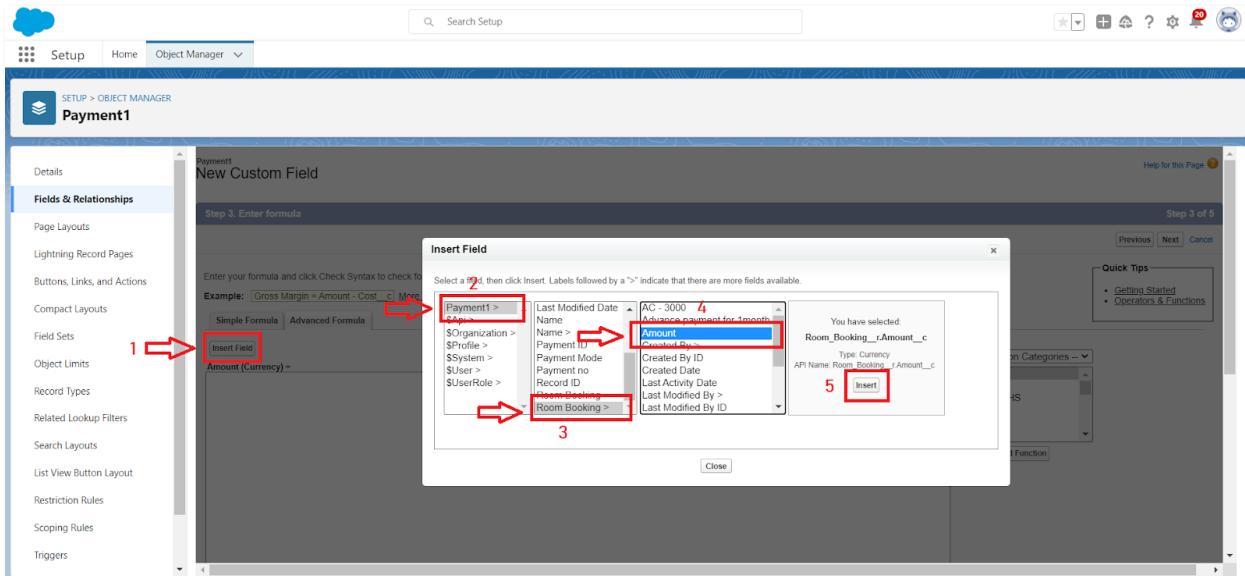
Calculate a percent and automatically add the percent sign to the number.
Example: `Discount = (Amount - Discounted_Amount_c) / Amount`

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

Calculate a time, for example, by adding a number of hours to another time.
Example: `Net = TIMEVALUE(NOW()) + 1`

Options
Decimal Places: Example: 899.00

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



7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.

Activity4 - Creation of fields for the Food Selection object

1. To create fields & relationship to an object:

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

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

Data Type

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

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

Food Selection

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related to:

Related To:

D&B Company
Data Source Record
-None-

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

Field Label:

Field Name:

Description:

Help Text:

Child Relationship Name:

Sharing Setting: Read Only: Allows users with at least Read Only 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 entry.

6. Fill the Above as following:

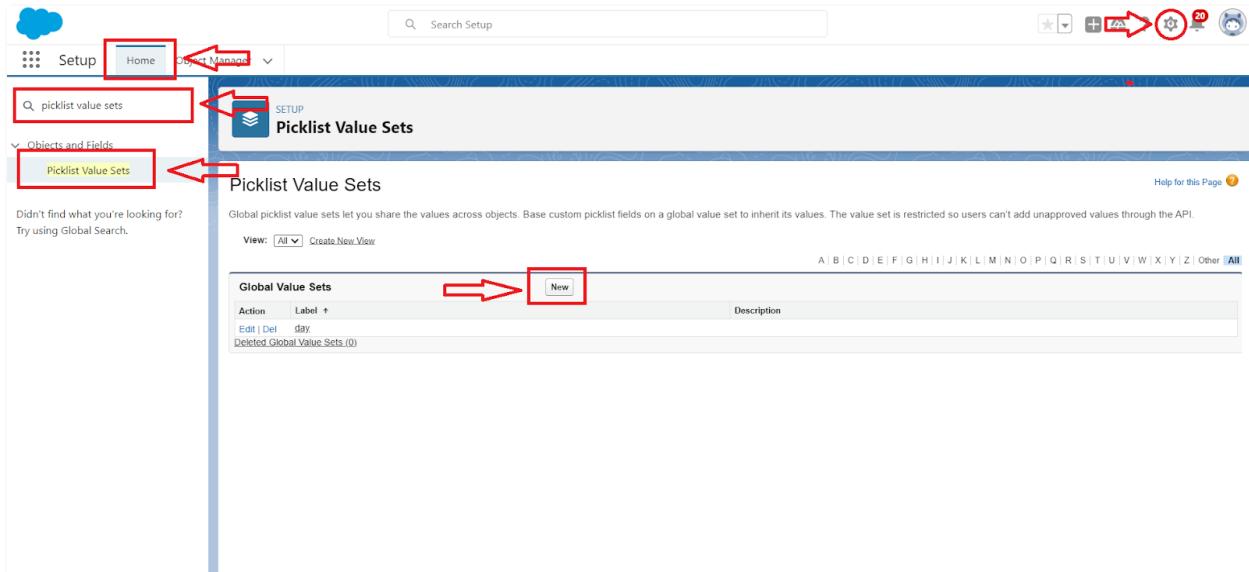
 - Change the Field Label: Name
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

Picklist value sets:

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

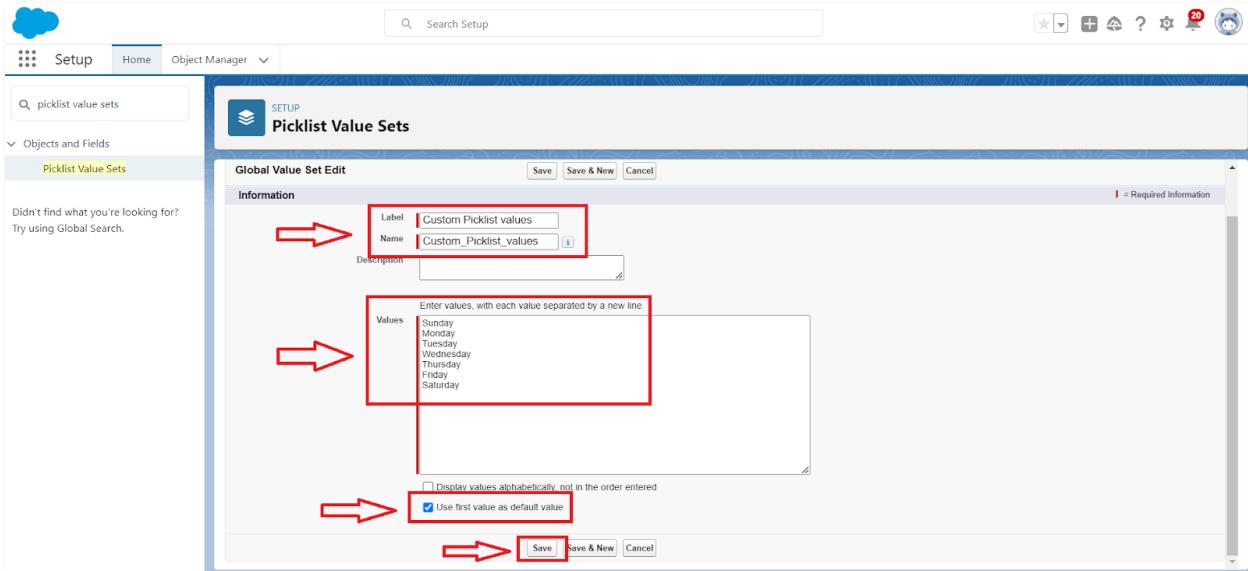
Create a picklist value set:

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



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

- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

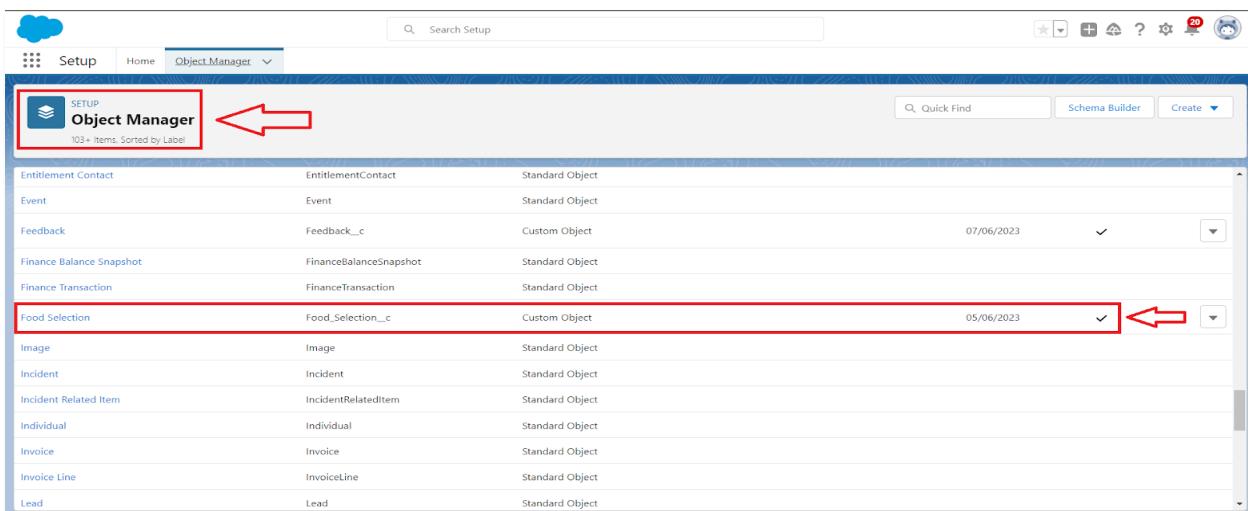


6. Check the Use first value as default value and Click on save.

2. Create a picklist Field for Food selection object

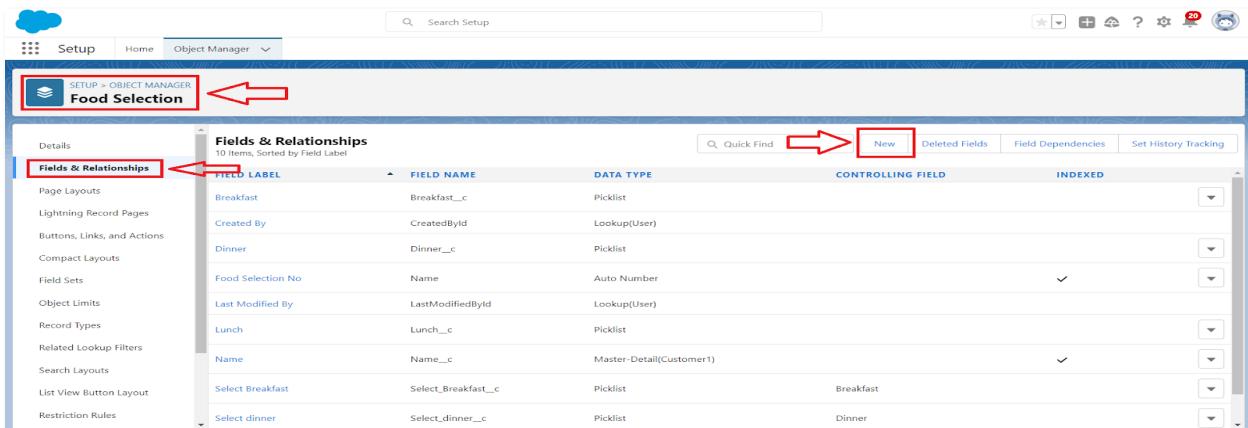
To create fields in an object:

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



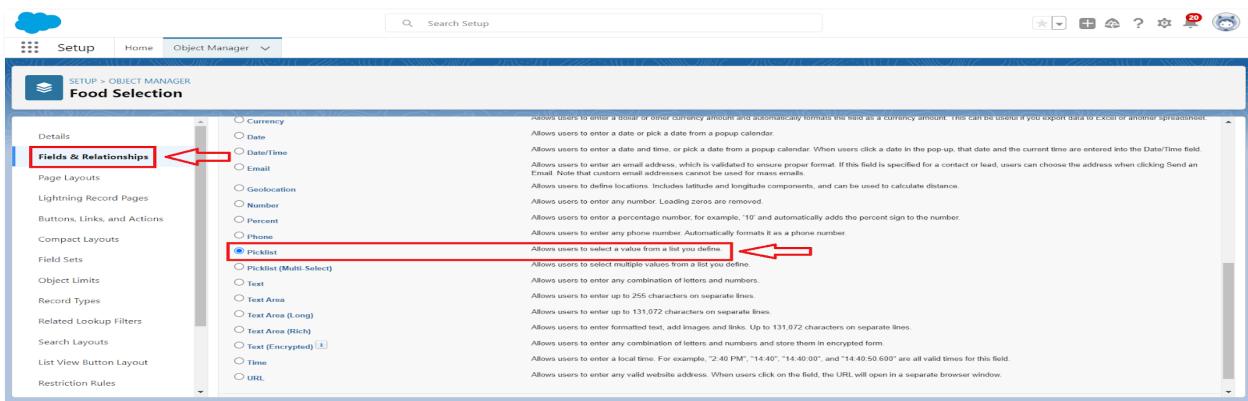
Entitlement Contact	EntitlementContact	Standard Object
Event	Event	Standard Object
Feedback	Feedback_c	Custom Object
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object
Food Selection	Food_Selection_c	Custom Object
Image	Image	Standard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

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



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”



Currency	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.
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 up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted) <small>(1)</small>	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50:600" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

4. 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.

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(Customer)		
Select Breakfast	Select_Breakfast_c	Picklist	Breakfast	
Select dinner	Select_dinner_c	Picklist	Dinner	

3. Select Data Type as a “Picklist”

Setup > Object Manager
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)
- Time
- URL

Setup > Object Manager
Food Selection

Fields & Relationships

Field Label:

Values:
 Enter values, with each value separated by a new line
 Use global picklist value set
 Use first value as default value
 Reuse picklist to the values defined in the value set

Field Name:

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

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

Default Value:

Show Formula Editor

Use formula syntax: Enclose list and picklist value API names in double quotes: '{Name, test}' include numbers without quotes
 To reference a custom metadata type value, use {CustomMetadata Type__r.Id} and access data via the standard formula {CustomMetadata Type__r.Id} RecordAPIName Field__c

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.

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.

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

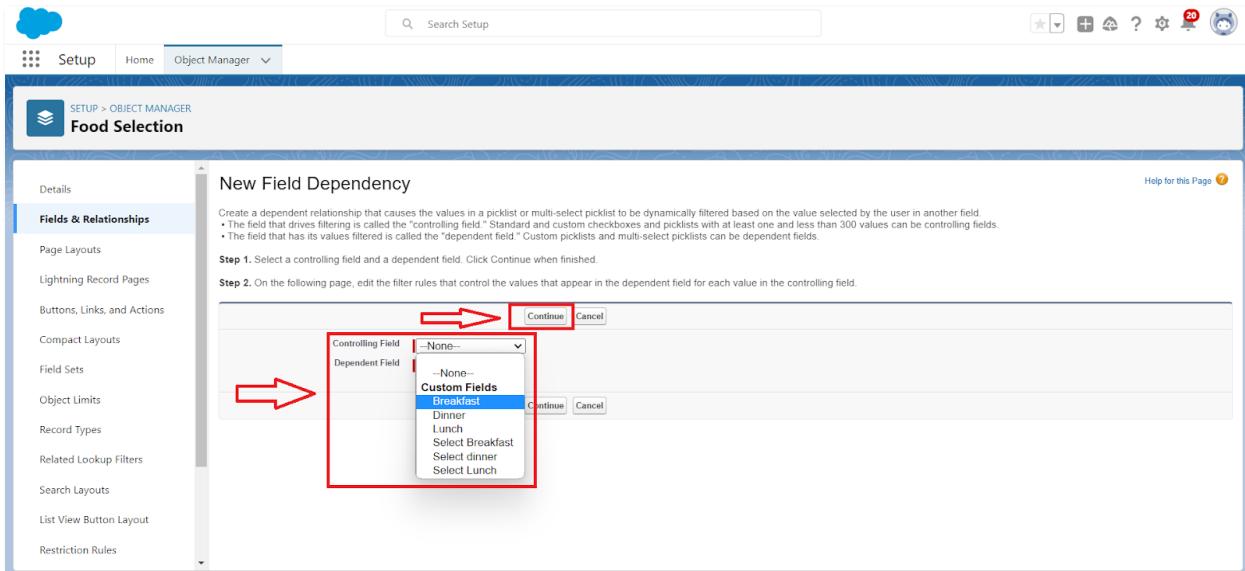
2. Now Click on fields & relationships and Click on Field Dependencies

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	

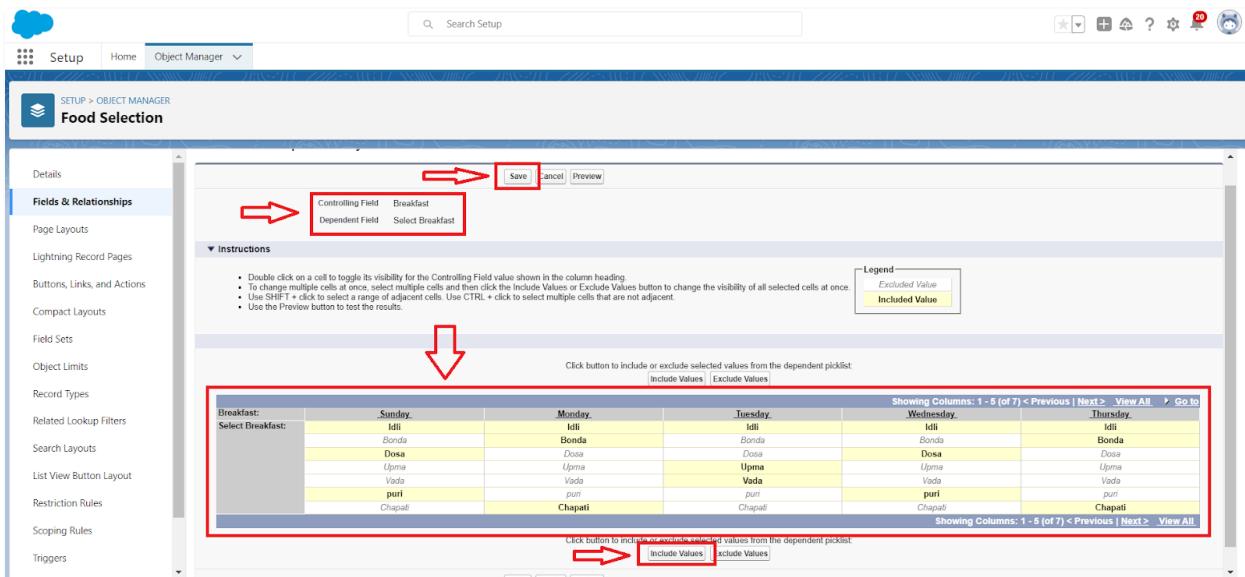
3. Now Click on New Option

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:

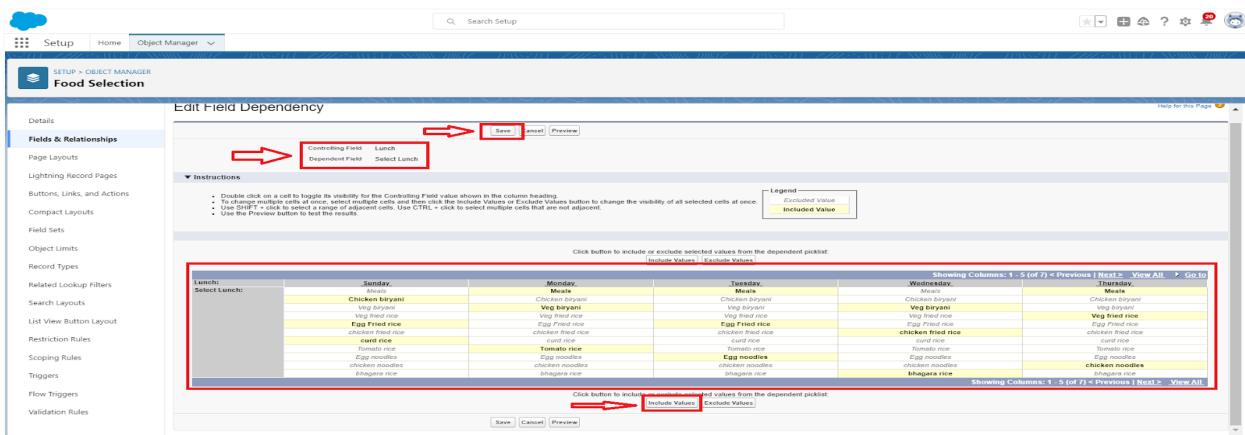
- Field Label: Lunch
- Under Value - Select the Use global picklist value set
- Under the drop down select the Custom Picklist Values
- Select required
- Click on Next > Next > Save and new.

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 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 set to 'Select dinner'. In the 'Sunday' column, three items are selected: 'Chicken biryani', 'Veg biryani', and 'Egg fried rice'. A legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'. A note at the bottom of the table says: 'Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.'

Activity5 - Creation of fields for the Feedback object

1. create fields & relationship to an object:

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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A red arrow points to the 'Feedback' object in the list, which is highlighted with a red border. Another red arrow points to the dropdown menu next to the last record, which also has a red border.

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

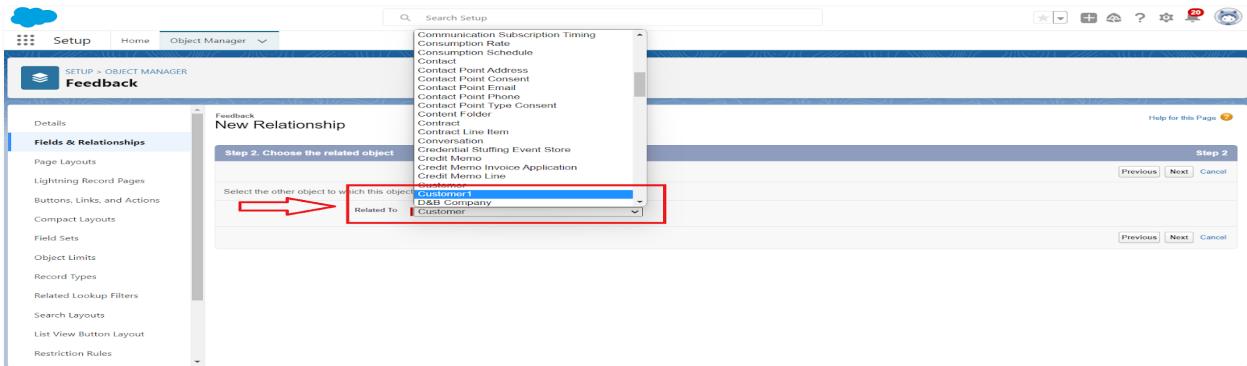
The screenshot shows the 'Fields & Relationships' page for the 'Feedback' object. A red arrow points to the 'Feedback' object in the breadcrumb navigation. Another red arrow points to the 'New' button in the top right corner of the table header.

3. Select Data Type as a “Lookup Relationship”

4. Click on Next

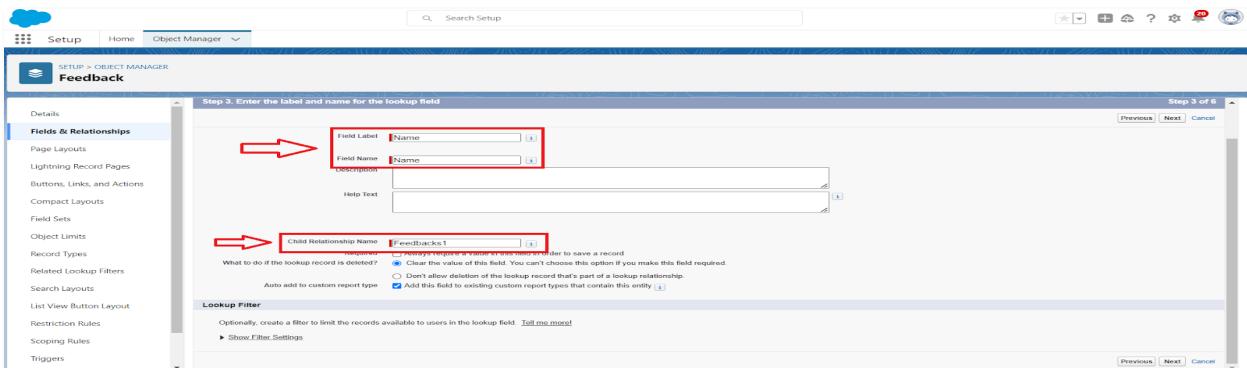
The screenshot shows the 'Data Type' selection step in the custom field creation wizard for the 'Feedback' object. A red arrow points to the 'Feedback' object in the breadcrumb navigation. Another red arrow points to the 'Lookup Relationship' option in the list of data types. A large red box highlights the description text for the 'Lookup Relationship' type.

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



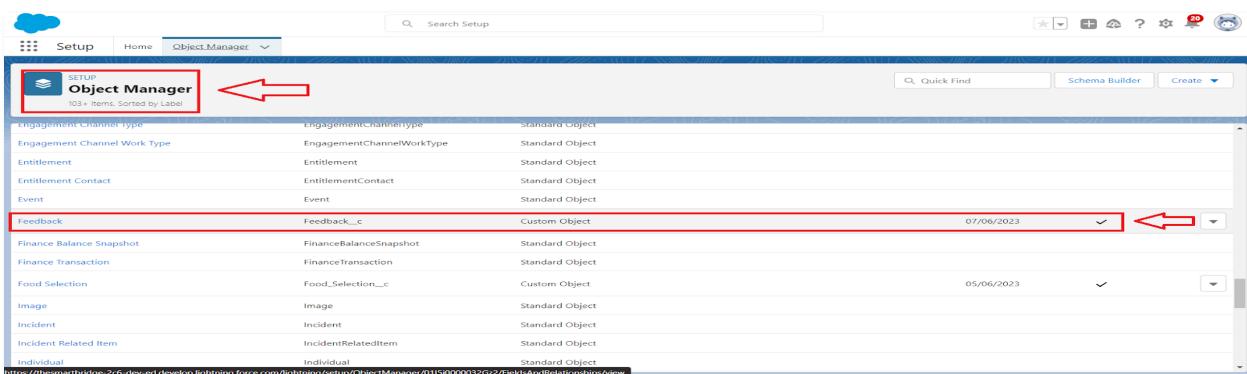
6. Fill the Above as following:

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



2. To create Another fields in an Same object:

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



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

Setup > Object Manager > Feedback

Fields & Relationships

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

3. Select Data Type as a “Picklist”

Setup > Object Manager > Feedback

Fields & Relationships

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

4. Click on Next

Setup > Object Manager > Feedback

Create Field

Field Label: Roomcleaning

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

Field Name: Roomcleaning

Description:

Help Text:

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

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

Default Value: Use formula editor. Enclose text and picklist value API names in double quotes ("Text", "PICKLIST"). Include numbers enclosed within double quotes ("12345"). Use formula editor reference a field from a Custom Metadata type record use \$CustomMetadataType__r.Records[Formula Field]

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.

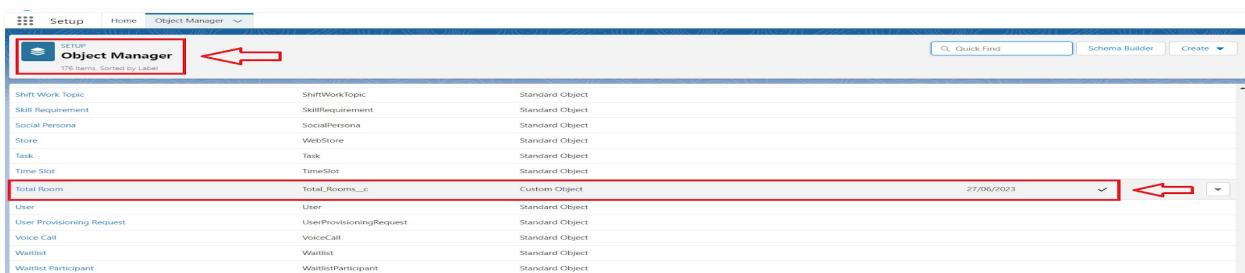
5. To create a Another Fields in an Same Object

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.

Activity6 - Creation of fields for the Total Rooms object

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

The screenshot shows the Salesforce Setup interface for the 'Total Room' object. The left sidebar has 'Fields & Relationships' selected (Step 1). At the top right, there is a 'New' button (Step 2), which is highlighted with a red box.

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

The screenshot shows the 'New Custom Field' wizard. Step 1: Choose the field type. The 'Formula' option is selected (Step 3), highlighted with a red box. Other options like 'None Selected', 'Auto Number', 'Roll-up Summary', 'Lookup Relationship', and 'Master-Detail Relationship' are shown below.

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

The screenshot shows the 'New Custom Field' wizard. Step 2: Formula Return Type. 'Number' is selected (Step 5), highlighted with a red box. Below it, 'Decimal Places' is set to 0 (Step 6), also highlighted with a red box. Other options like 'Boolean', 'Text', 'Date', etc., are listed.

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

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

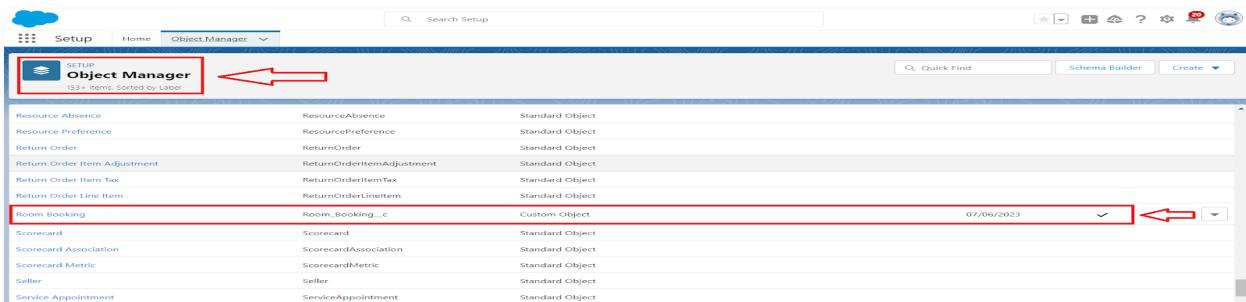
10. Click on Next > Next > Save and new.

Task6 - Validation rule

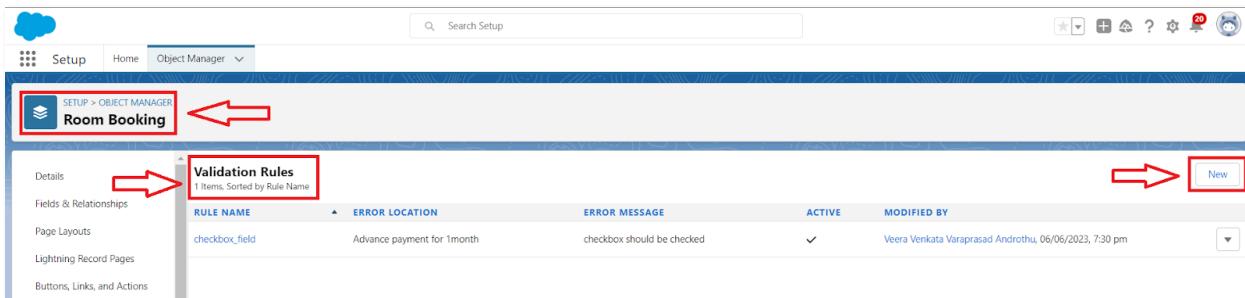
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Activity1 - create a validation rule to an Room Booking Object

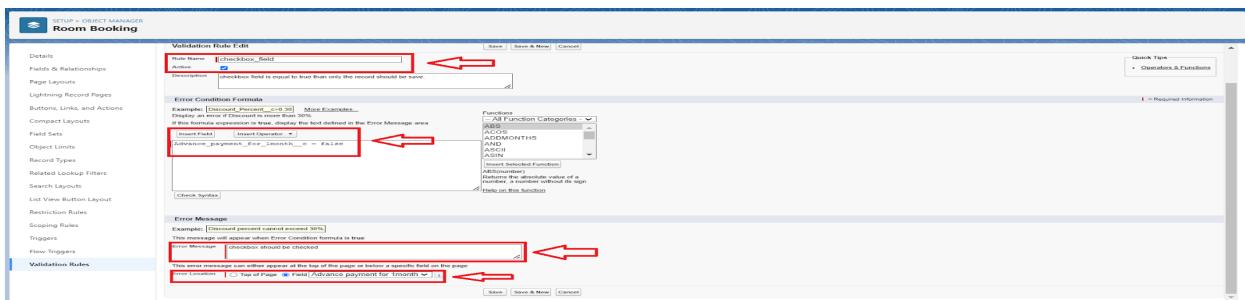
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.



2. Now click on “Validation rule” at top > New.



3. Enter Rule name “checkbox field” and make the validation should be Active.
4. Enter the formula in the formula Box “Advance_payment_for_1month_c = false” and check for syntax error.
5. Enter the error message “Checkbox should be checked”
6. Select error location as field(Advance payment for 1month)



7. Click on save.

Activity2 - 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)

1

2

3

4

7. Click on save.

Task7 - 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 deleted 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:

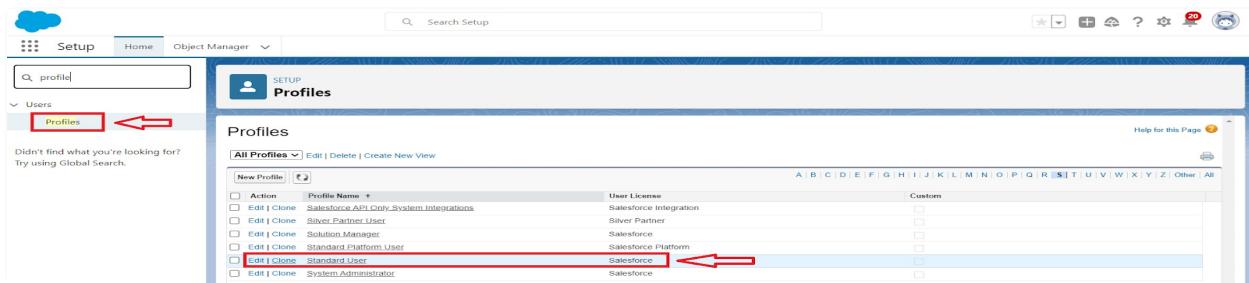
Custom ones defined by us.

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

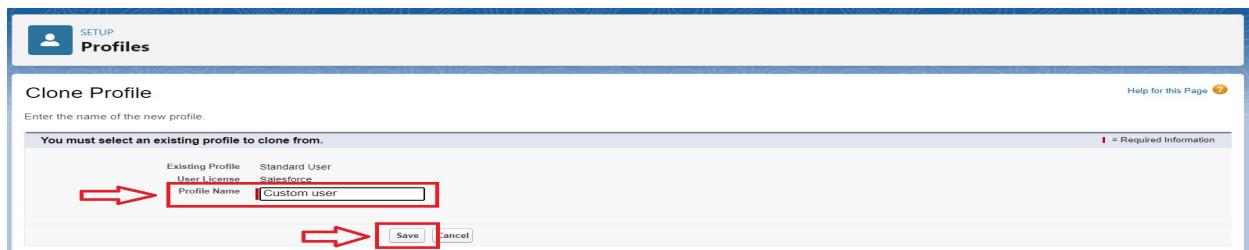
Activity1 - Custom user Profile

To create a new profile:

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



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



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

- 4.Scroll down to Custom Object Permissions and Give All access permissions for

Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

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

5.Scroll down and Click on Save.

Activity2 - 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.

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

5.Scroll down and Click on Save.

Acyivity3 - Custom platform user2

To create a new profile:

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

The screenshot shows the 'Edit Profile' page in Salesforce. At the top, there are two sections of 'Custom Object Permissions' highlighted with red boxes and connected by a red arrow. The first section covers 'Customers', 'Feedbacks', and 'Food Selections'. The second section covers 'Payments', 'Room Bookings', and 'Total Rooms'. Both sections include columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All, Modify All). Below these sections are 'Session Settings' and 'Password Policies'.

- 5.Scroll down and Click on Save.

Task8 - 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.

Activity1 - Marketing Role

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

Setup Home Object Manager

Search Setup

role

Users Roles **Roles** [red arrow]

Feature Settings

- Sales
 - Contact Roles on Contracts
 - Contact Roles on Opportunities
- Service
 - Case Teams
 - Case Team Roles
 - Contact Roles on Cases

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

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy Territory-based Sample

Executive Staff

- CEO President View & edit data, roll up forecasts, & generate reports
- CFO VP, Sales Can't access data of other Executive Staff

Western Sales

- Director of W. Sales View & edit data, roll up forecasts, & generate reports
- Western Sales Rep View & edit data, roll up forecasts, & generate reports
- CA Sales Rep View & edit data, roll up forecasts, & generate reports
- OR Sales Rep View & edit data, roll up forecasts, & generate reports

Eastern Sales

- Director of E. Sales View & edit data, roll up forecasts, & generate reports
- Eastern Sales Rep View & edit data, roll up forecasts, & generate reports
- NY Sales Rep View & edit data, roll up forecasts, & generate reports
- MA Sales Rep View & edit data, roll up forecasts, & generate reports

International

- Director of Int'l Sales View & edit data, roll up forecasts, & generate reports
- International Sales Rep View & edit data, roll up forecasts, & generate reports
- Asian Sales Rep View & edit data, roll up forecasts, & generate reports
- European Sales Rep View & edit data, roll up forecasts, & generate reports

* View & edit data, roll up forecasts, & generate reports
Can't access data of other Executive Staff

Set Up Roles [red arrow]

Don't show this page again

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

Your Organization's Role Hierarchy

Collapse All **Expand All** [red arrow]

Nick Enterprises

- Add Role**
- CEO** Edit | Del | Assign
 - Add Role** [red box]
 - 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**

3. 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 [red arrow] **Save & New** **Cancel**

4. Then click on Save.

Activity2 - 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.

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.

Activity1 - Create User

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

The screenshot shows the Salesforce Setup interface under the 'Users' section. On the left, there's a sidebar with various setup categories like Permission Set Groups, Profiles, and Roles. The 'Users' category is highlighted with a yellow box and has a red arrow pointing to it. The main area is titled 'All Users' and contains a table of existing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. At the top of the user list table, there are three buttons: 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red arrow points to the 'New User' button.

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 'New User' edit page. It has two main sections: 'General Information' and 'Advanced Settings'. In the 'General Information' section, there are input fields for First Name (sandeep), Last Name (gujja), Alias (sgujj), Email (sandeep@gmail.com), Username (gsandeep@sunny.com), and Nickname (Sunny). A red box highlights the 'First Name' and 'Last Name' fields, and a red arrow points to it. In the 'Advanced Settings' section, there are dropdown menus for Role (CEO), User License (Salesforce), Profile (Custom user), and Active (checkmark). Another red box highlights the 'Role' and 'User License' fields, and a red arrow points to it. There are also other optional settings like Marketing User, Offline User, etc., which are not highlighted.

3. save.

Activity2 - 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: gagara
Email: abhi@gmail.com
Username: gabhi@tech.com
Nickname: abhi

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

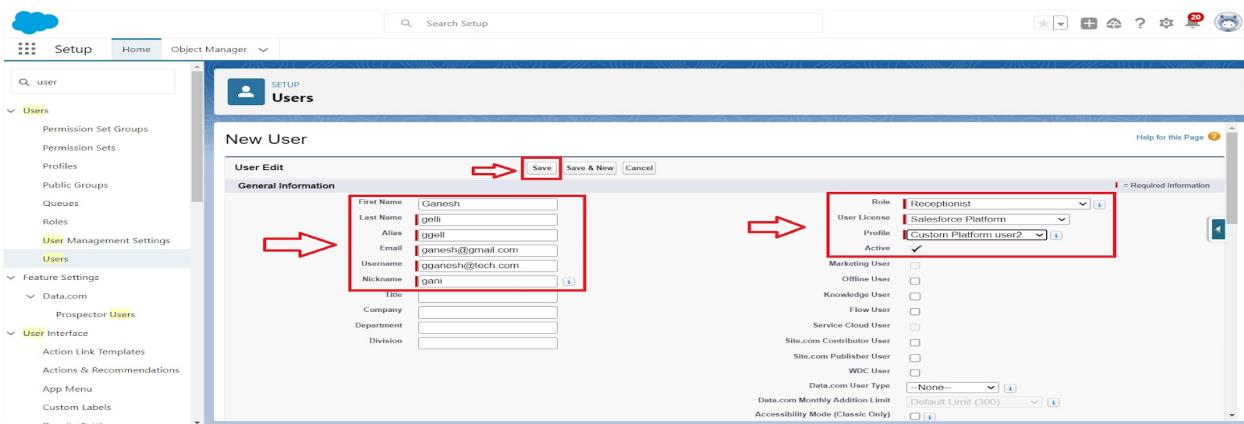
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type: --None--

3. save

Activity3 - 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

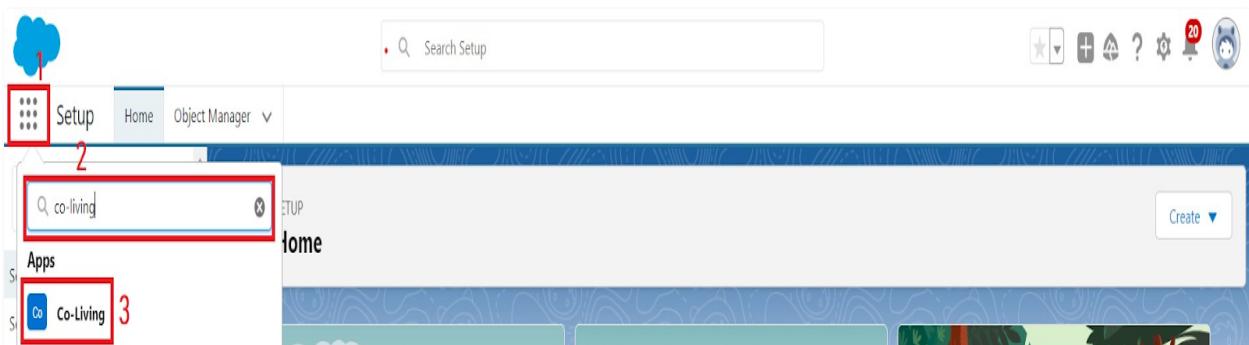


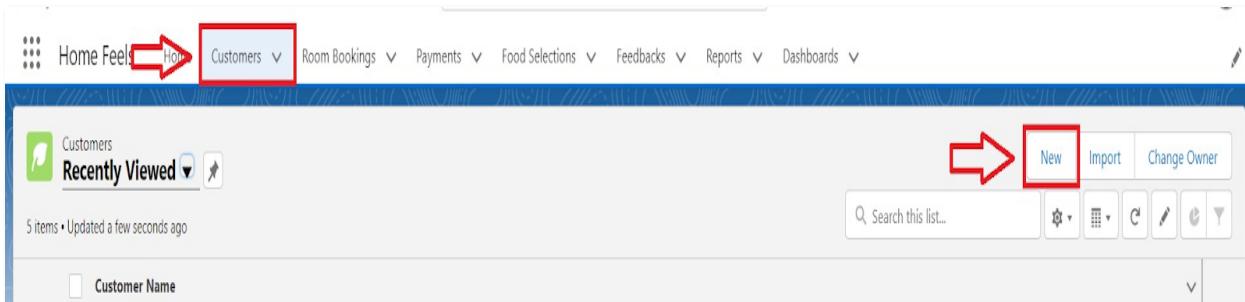
3. Save

Task10 - User Adoption

Activity1 - 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.

This screenshot shows a 'New Customer1' form. On the left, there's a section labeled 'Information' containing fields for 'Customer Name' (text: 'Text'), 'Phone no' (text: '9702874232'), and 'Email id' (text: 'tech@gmail.com'). On the right, there's an 'Owner' section with a profile picture and name ('Veera Venkata Varaprasad Androthu') and a 'Permanent Address' field ('Hyderabad'). Below these are 'current Status' dropdowns set to 'Employee'. A large red box highlights the entire 'Information' section. A red arrow points down to the 'Save' button at the bottom right of the form. The 'Save' button is highlighted with a red box and an arrow pointing to it from the right.

4. Click new and fill details & Save

Activity2 - 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 a CRM application interface. At the top, there is a navigation bar with links: Co-Living, Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. A red box highlights the 'Customers' link. Below the navigation bar is a search bar labeled 'Search...' and a toolbar with various icons. The main area displays a 'Recently Viewed' list titled 'Customers' with 5 items, updated a few seconds ago. The list includes columns for Customer Name and a checkbox. One entry, 'sandeep', has a red arrow pointing to its checkbox. The interface then transitions to a detailed view of the 'sandeep' record. This view has tabs for 'Related' and 'Details'. The 'Details' tab is selected and highlighted with a red box. It contains fields for Customer Name ('sandeep'), Phone no ('970526532'), Email id ('sandeep@gmail.com'), Owner ('Veera Venkata Varaprasad Androthu'), Permanent Address ('Hyderabad'), current Status ('Employee'), and Last Modified By ('Veera Venkata Varaprasad Androthu').

Activity3 - Delete a Record (Customers)

Click on App Launcher on the left side of the screen.

Search Home Feels & click on it.

Click on the Customers Tab.

Click on Arrow at right hand side on that Particular record.

Click delete and delete again.

This screenshot shows the same CRM application interface as the previous one, but with a different focus. The 'Recently Viewed' list is displayed, showing 5 items updated 2 minutes ago. The list includes entries for 'sandeep' (marked with a red box), 'Abhilash', 'Ganesh', 'suman', and 'Prasad'. To the right of the list, a context menu is open for the 'sandeep' entry. The menu options are numbered: 3 (Edit), 4 (Delete), and Change Owner. The 'Delete' option is highlighted with a red box. The rest of the interface remains consistent with the previous screenshot, showing the navigation bar, search bar, and toolbar.

Tasak11 - Reports

Introduction:

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

Activity1 - Create Report

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

The screenshot shows the Salesforce interface for managing reports. At the top, there's a navigation bar with tabs for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is highlighted with a red box and labeled '1'), and Dashboards. Below the navigation bar is a search bar labeled 'Search recent reports...' (labeled '2'). On the right side of the search bar are buttons for 'New Report' (highlighted with a red box and labeled '3') and 'New Folder'. The main area displays a list of reports under the 'Recent' tab. The report list includes columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. There are also filters for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. The first two reports listed are 'Room booking report' and 'Room booking report', both created by 'Veera Venkata Varaprasad Androthu'. The third report listed is 'Sample Flow Report: Screen Flows', which is a 'Public Reports' type created by 'Automated Process' on 5/6/2023 at 10:09 am.

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

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' page. On the left, there's a sidebar with a 'Category' section containing 'Recently Used' items like 'All' (marked with red box 1), 'Accounts & Contacts', 'Opportunities', etc. Below that is a search bar with 'customers' typed in (marked with red box 2). To the right is a main table titled 'Select a Report Type' with columns 'Report Type Name' and 'Category'. The table lists various report types: 'Activities with Customers' (Standard), 'Customers' (Standard) (marked with red box 3), 'Customers with Room Bookings and Total Rooms' (Standard) (marked with red box 4), '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).

4. Customize your report

5. Add fields from left pane as shown below

This screenshot shows the 'Room booking report' customization interface. On the left, there's a 'Fields' pane with sections for 'Outline' (highlighted with a red box), 'Groups' (highlighted with a red box), 'GROUP ROWS' (highlighted with a red box), 'Customer Name' (highlighted with a red box), 'GROUP COLUMNS' (highlighted with a red box), and 'Columns' (highlighted with a red box). The main area displays a table of customer data with columns: Customer Name, Room No, Phone no, Email id, Permanent Address, current Status, Room sharing, Advance payment for 1month, AC - 3000, and Amount. A red arrow points to the 'Subtotal' row in the table. At the bottom, there are buttons for 'Save' (highlighted with a red box) and 'Run'.

5. Save or run it.

Activity2 - 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.

Task12 - Dashboards

Introduction:

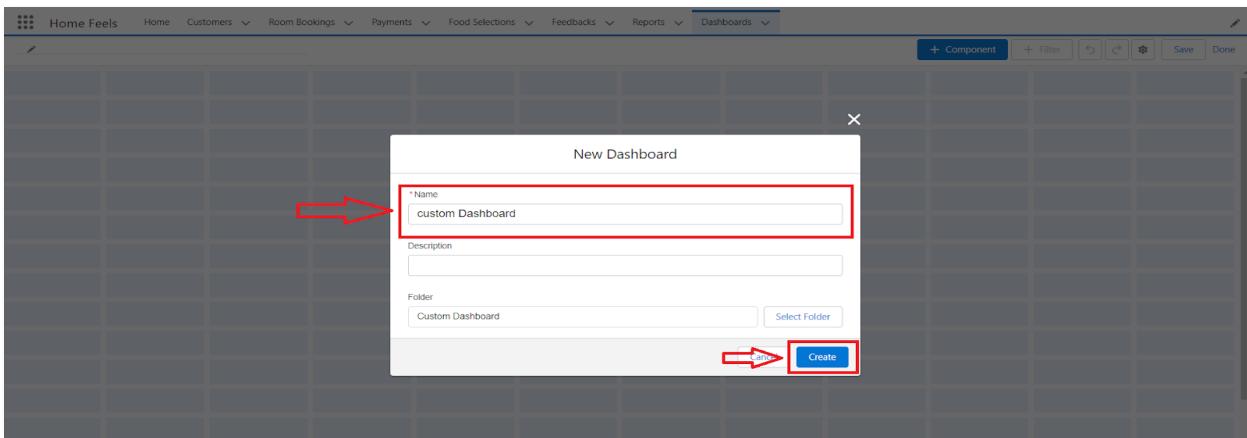
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Activity1 - Create Dashboard

1. Go to the app > click on the Dashboard tabs and click on new Dashboard

The screenshot shows a web-based application interface. At the top, there is a navigation bar with various menu items: Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Dashboards' item is highlighted with a red box and has a dropdown arrow. Below the navigation bar, there is a search bar labeled 'Search...' and some user icons. The main content area is titled 'Dashboards' and shows a list of recent items with a count of '2 items'. At the top of this list, there is a search bar labeled 'Search recent dashboards...' and a red box around the 'New Dashboard' button. Below the search bar, there are several filter options: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The 'New Dashboard' button is located at the top right of the list area, also enclosed in a red box.

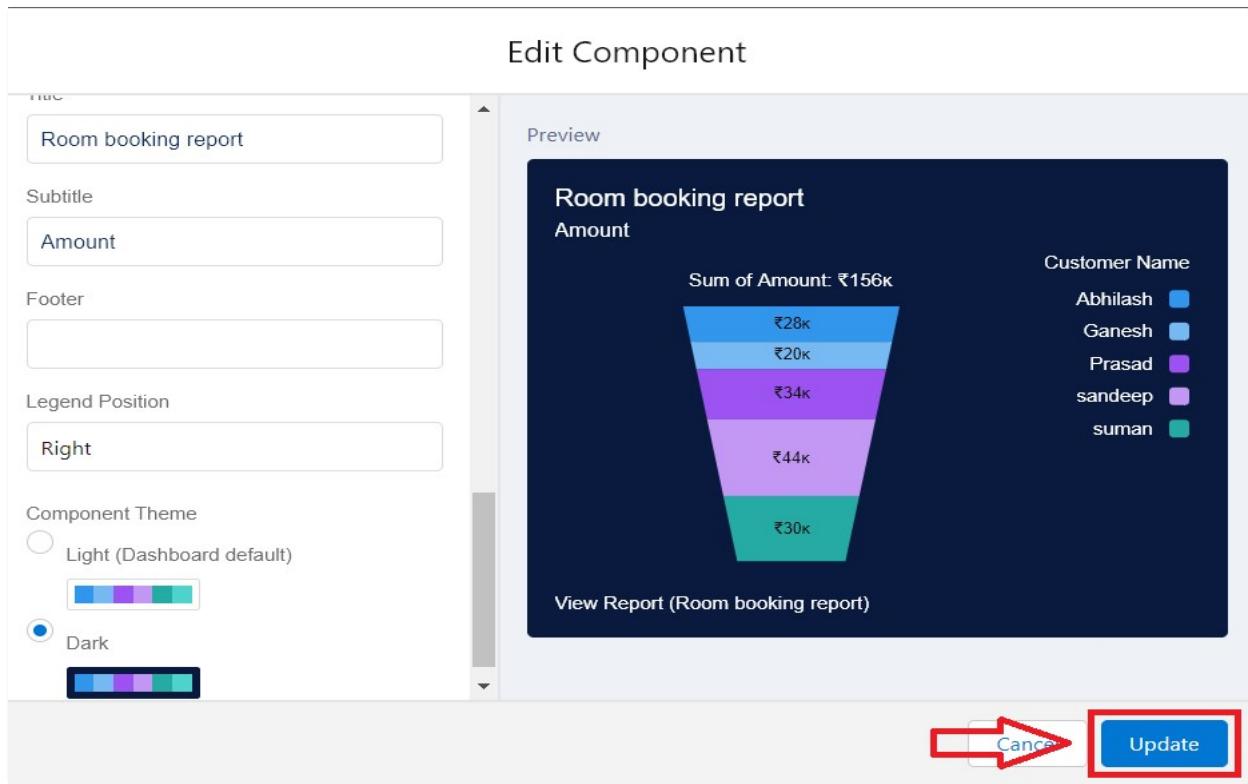
2. Give a Name and click on Create.



3. Select add component.

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

The screenshot shows a 'Select Report' dialog box. The 'Recent' section lists a report titled 'Room booking report' by 'Veera Venkata Varaprasad Androthu' from 'Private Reports' on '14-Jun-2023, 2:58 pm'. The 'Select' button at the bottom right is highlighted with a red box and an arrow.



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

Activity2 - Create Another Dashboard

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

Task13 - Flows

Introduction:

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are

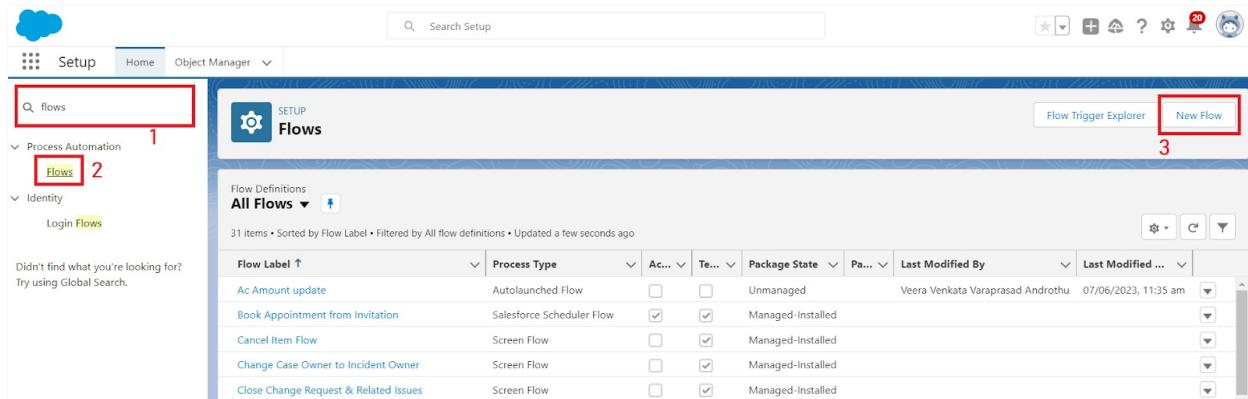
built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

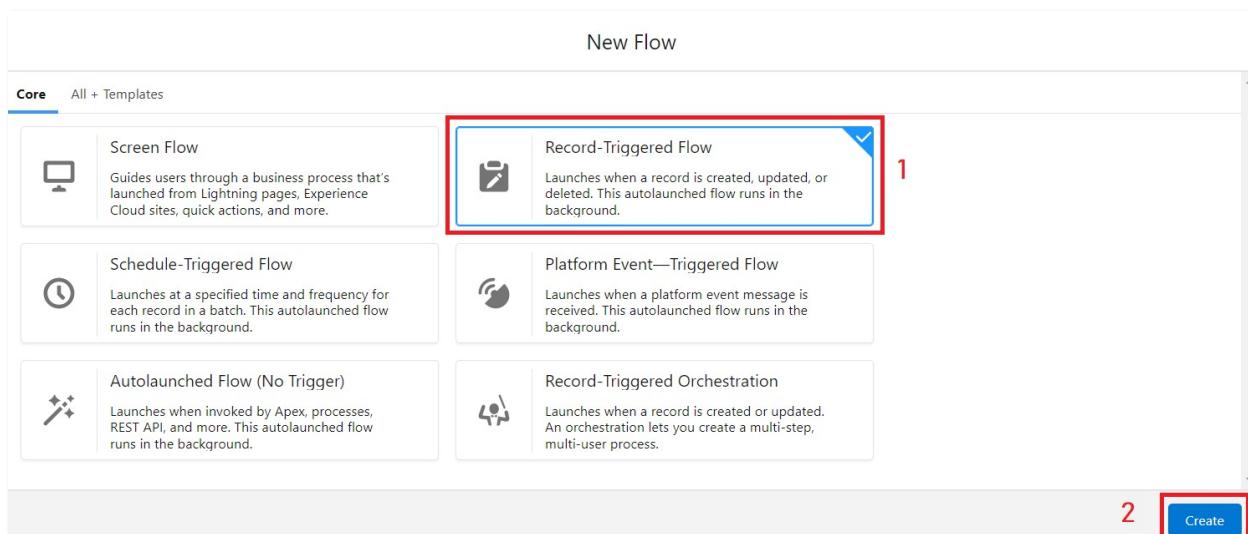
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Activity1 - 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.

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

* Optimize the Flow for:

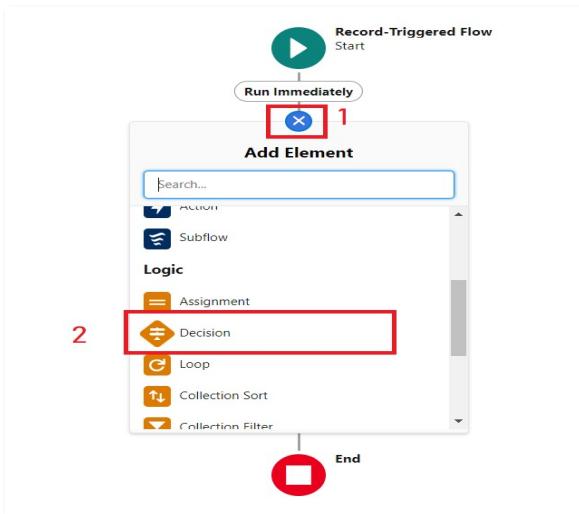
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records 3
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

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

4 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.
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 0 +	OUTCOME DETAILS 2												
## Single Sharing 4	* Label Single Sharing * Outcome API Name Single_Sharing												
Default Outcome													
Condition Requirements to Execute Outcome All Conditions Are Met (AND)													
<table border="1"> <tr> <td>Resource : \$Record > Room sharing X</td> <td>Operator Equals</td> <td>Value single sharing</td> <td>3</td> </tr> <tr> <td>Resource AND \$Record > AC - 3000 X</td> <td>Operator Equals</td> <td>Value False X</td> <td></td> </tr> <tr> <td colspan="4">+ Add Condition</td> </tr> </table>		Resource : \$Record > Room sharing X	Operator Equals	Value single sharing	3	Resource AND \$Record > AC - 3000 X	Operator Equals	Value False X		+ Add Condition			
Resource : \$Record > Room sharing X	Operator Equals	Value single sharing	3										
Resource AND \$Record > AC - 3000 X	Operator Equals	Value False X											
+ 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.

OUTCOME ORDER 0 +	OUTCOME DETAILS 1	<input type="button" value="Delete Outcome"/>											
## Single Sharing 3	* Label Double sharing * Outcome API Name Double_sharing												
Default Outcome													
Condition Requirements to Execute Outcome All Conditions Are Met (AND)													
<table border="1"> <tr> <td>Resource : \$Record > Room sharing X</td> <td>Operator Equals</td> <td>Value Double sharing</td> <td>2</td> </tr> <tr> <td>Resource AND \$Record > AC - 3000 X</td> <td>Operator Equals</td> <td>Value False X</td> <td></td> </tr> <tr> <td colspan="4">+ Add Condition</td> </tr> </table>		Resource : \$Record > Room sharing X	Operator Equals	Value Double sharing	2	Resource AND \$Record > AC - 3000 X	Operator Equals	Value False X		+ Add Condition			
Resource : \$Record > Room sharing X	Operator Equals	Value Double sharing	2										
Resource AND \$Record > AC - 3000 X	Operator Equals	Value False X											
+ Add Condition													

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

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

The screenshot shows the 'OUTCOME ORDER' section of a configuration tool. A new outcome is being added, indicated by a red box around the 'OUTCOME DETAILS' row. The 'Label' field contains 'Triple Sharing' and the 'Outcome API Name' field contains 'Triple_Sharing'. Below this, a condition requirement dropdown is set to 'All Conditions Are Met (AND)'. The 'Default Outcome' section is visible on the left. The 'OUTCOME ORDER' list on the right shows three items: 'Single Sharing' (selected), 'Double sharing', and 'Triple Sharing'. A red box labeled '3' highlights the 'Single Sharing' item. A red box labeled '1' highlights the 'OUTCOME DETAILS' row. A red box labeled '2' highlights the condition requirements and the 'Default Outcome' list.

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

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

OUTCOME ORDER 3

OUTCOME DETAILS

1

* Label: Single Ac * Outcome API Name: Single_Ac

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

2

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

Delete Outcome

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

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

OUTCOME ORDER 3

OUTCOME DETAILS

1

* Label: Double Ac * Outcome API Name: Double_Ac

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

2

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

Delete Outcome

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

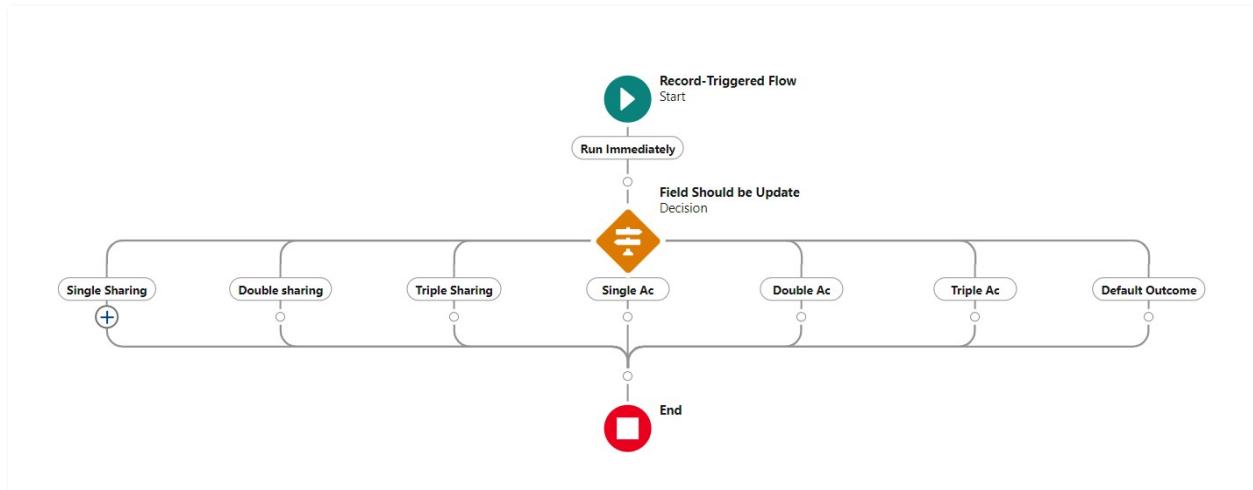
- Resource: Select Record.Room sharing.
- Operator: Select Equals.
- Value: Select Triple sharing.

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

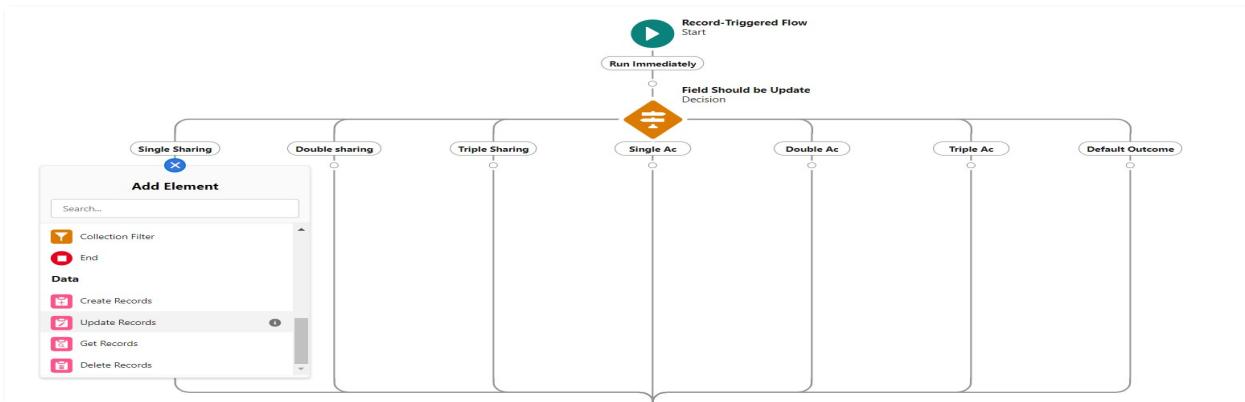
New Decision

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

OUTCOME ORDER	OUTCOME DETAILS	
1	*Label: Triple Ac *Outcome API Name: Triple_Ac Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	<input type="button" value="Delete Outcome"/>
2	Resource: \$Record > Room sharing, Operator: Equals, Value: Triple sharing AND Resource: \$Record > AC - 3000, Operator: Equals, Value: True	<input type="button" value=""/>
<input type="button" value="+ Add Condition"/>		
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		
		<input type="button" value="3"/> <input type="button" value="Cancel"/> <input type="button" value="Done"/>



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



15. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label	* API Name
single	single
Description	

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

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field	Value
Amount__c	← 28000 Delete

Cancel
Done

16. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Double	Double

Description

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

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record	▼
---------------------------	---

Set Field Values for the Room Booking Record

Field	Value
Amount__c	← 24000 Delete

+ Add Field
Cancel
Done

17. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Triple	Triple
Description <div style="border: 1px solid #ccc; height: 50px; width: 100%;"></div>	

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

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record	▼
---------------------------	---

Set Field Values for the Room Booking Record

Field	Value
Amount_c	← 20000 Delete
+ Add Field	

Cancel
Done

18. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label	* API Name
single_ac1	single_ac1
Description	
<div style="border: 1px solid #ccc; height: 40px; margin-bottom: 10px;"></div>	

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

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record	▼
---------------------------	---

Set Field Values for the Room Booking Record

Field	Value
Amount__c	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	
<div style="border: 1px solid #ccc; padding: 5px; height: 40px;"></div>	

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

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record	▼
---------------------------	---

Set Field Values for the Room Booking Record

Field	Value
Amount__c	← 30000 ✖
+ Add Field Done Cancel	

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

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

26000

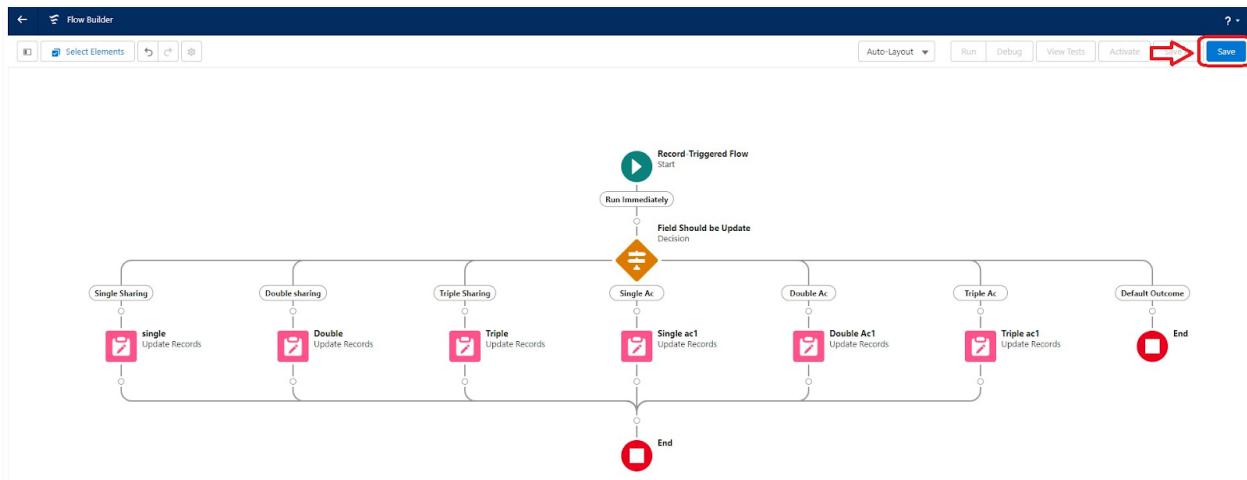


+ Add Field

Cancel

Done

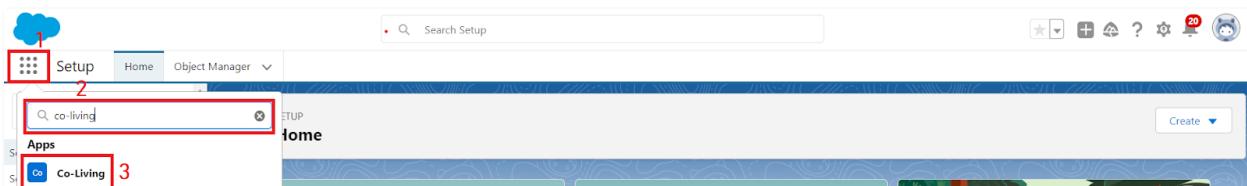
21. The Flow will Form like This and Click on save.



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

Activity2 - 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.

The screenshot shows the 'Room Bookings' list screen in the Co-Living app. At the top, there's a navigation bar with 'Co-Living' (highlighted by a red box labeled 1), 'Home', 'Customers', 'Room Bookings' (highlighted by a red box labeled 2), 'Payments', 'Food Selections', 'Feedbacks', 'Reports', and 'Dashboards'. Below the navigation is a search bar and a toolbar with various icons. The main area displays a table with columns: Room No, Name, Room sharing, AC - 3000, Advance payment for 1..., and Amount. A red box labeled 3 highlights the 'New' button in the top right corner of the table header.

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.

The screenshot shows the 'New Room Booking' form. The 'Information' tab is selected. The form fields include:

- Room No: AC - 3000 (checked)
- Name: Prasad
- Room sharing: Double sharing - 12000
- AC - 3000: Checked
- Advance payment for 1month: Checked
- Amount: Empty field highlighted with a red box

At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons. A note at the top right indicates that * = Required Information.

The screenshot shows the 'Room Bookings' section of the Co-Living software. At the top, there are navigation tabs: Home, Customers, Room Bookings (which is selected and highlighted in blue), Payments, Food Selections, Feedbacks, Reports, and Dashboards. Below the tabs, a header bar displays a coffee cup icon and the text 'Room Booking RN-008'. The main content area is titled 'Details' and contains the following fields:

Room No	AC - 3000
RN-008	<input checked="" type="checkbox"/>
Name	Advance payment for 1month
Prasad	<input checked="" type="checkbox"/>
Room sharing	Amount
Double sharing - 12000	₹30,000

Below the form, there are two timestamped entries:

- Created By: [Veera Venkata Varaprasad Androthu](#), 19/06/2023, 12:37 pm
- Last Modified By: [Veera Venkata Varaprasad Androthu](#), 19/06/2023, 12:37 pm

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

