

A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING



Name: yadla vara prasad

Email: prasadyadla79823@gmail.com

PROJECT ABSTRACT :

The Co-living space project aims to create a vibrant and inclusive community where individuals can live, work, and connect with like-minded people. We believe that living

together in a shared environment fosters collaboration, reduces isolation, and enhances the overall quality of life.

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

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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:

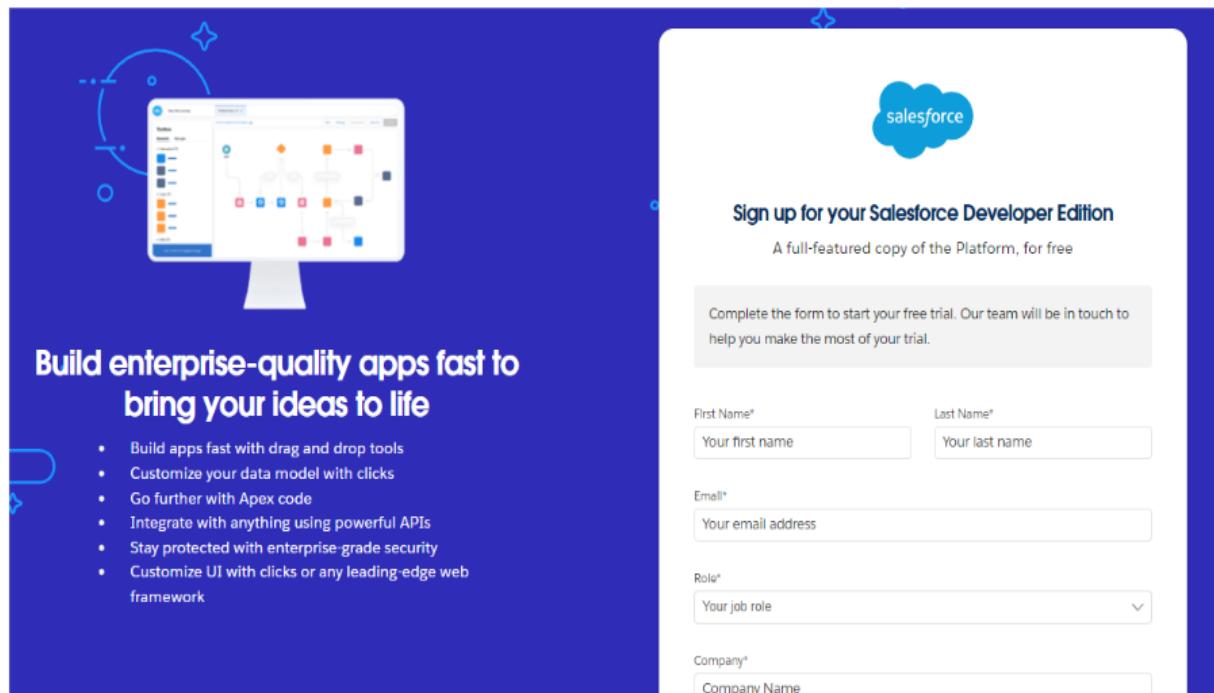
<https://youtu.be/r9EX3lGde5k>

Activity1- Creating Developer Account

Creating a developer org in salesforce.

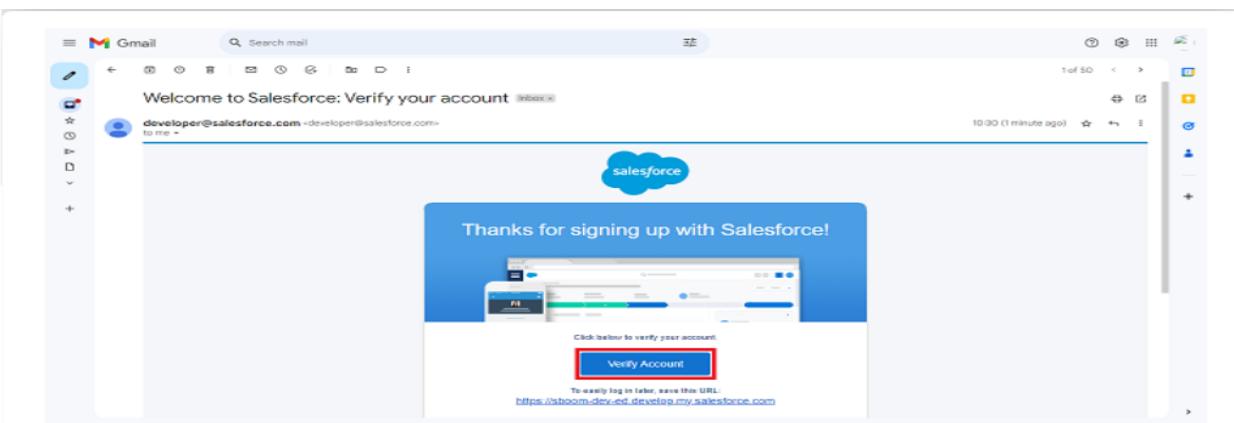
1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
 1. First name & Last name

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" form. The title is "Change Your Password". It asks for a new password and includes validation rules: "8 characters", "1 letter", and "1 number". The "New Password" field and its confirmation field 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 "asdfghijkl". A "Change Password" button at the bottom is also highlighted with a red box.

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:

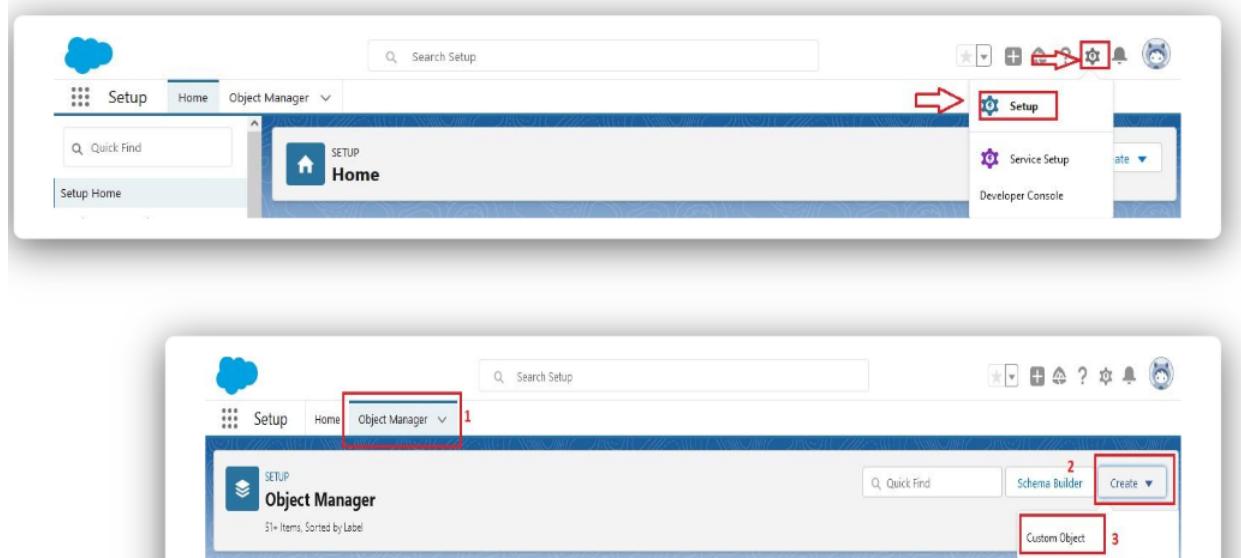
1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. 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 labels, validation rules, and reports.

Label:	Total Room	Example: Account	1
Plural Label:	Total Rooms	Example: Accounts	

Starts with vowel sound:

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

Object Name:	Total Rooms	Example: Account	2
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Description:

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

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, lists, and reports. To learn more about Record Names, see Record Name. 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	3
Data Type:	Text		

Optional Features

- Allow Reports
- Allow Bulk API Access
- Track Field History
- Allow in Chatter Groups
- Enable Chatter (Beta)

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 Streaming API Access

Deployment Status

In Development

Deployed

Search Status

Allow search: 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 ".

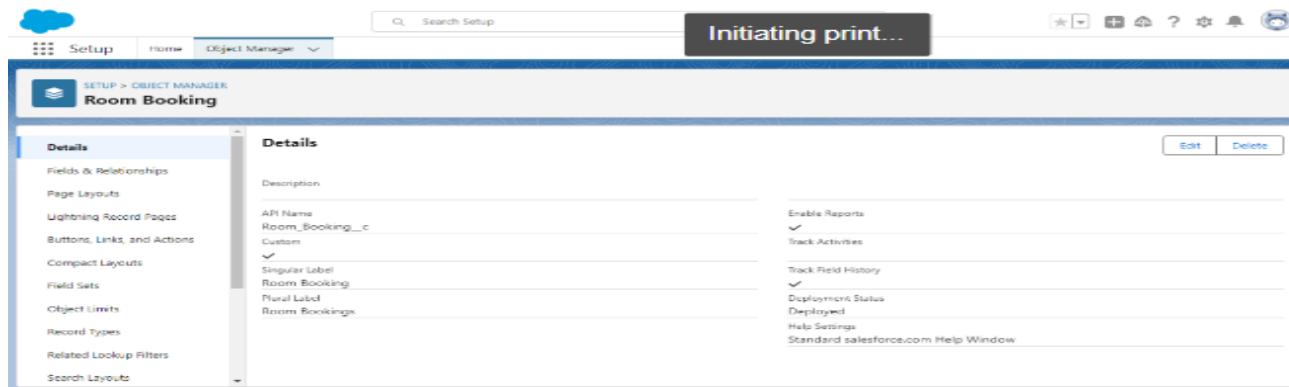
4. Fill in the plural label as " Customers ".
5. Record name: "Customer Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select 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.

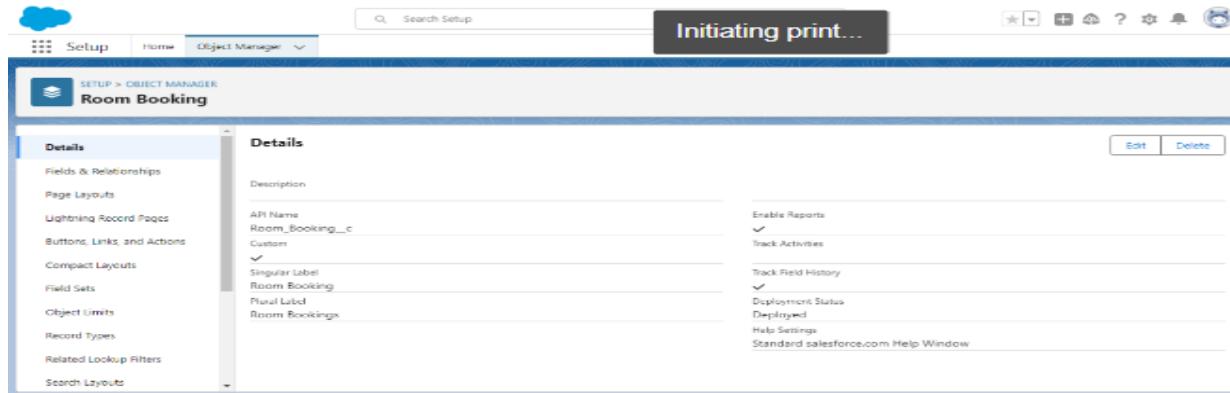


Activity4 - Create a custom object for Payment

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.

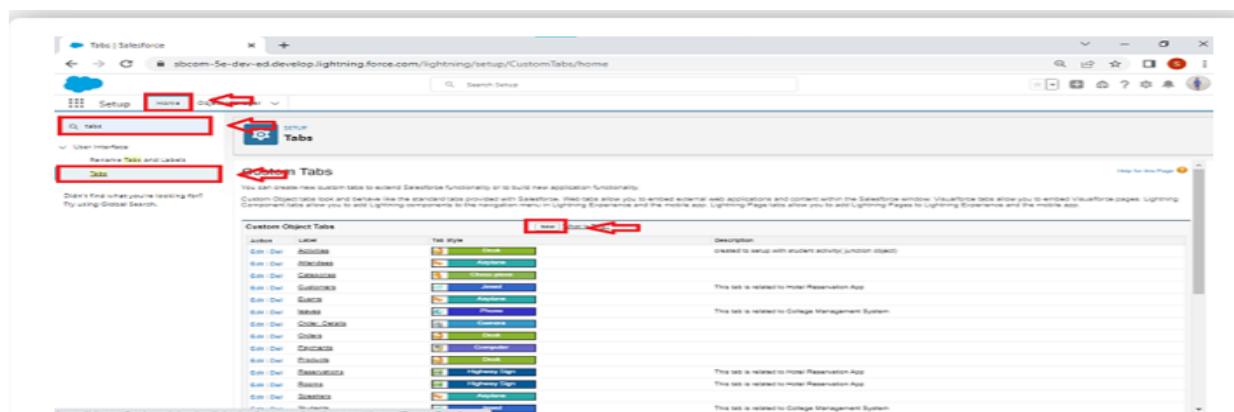
5.Lightning Page Tabs

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

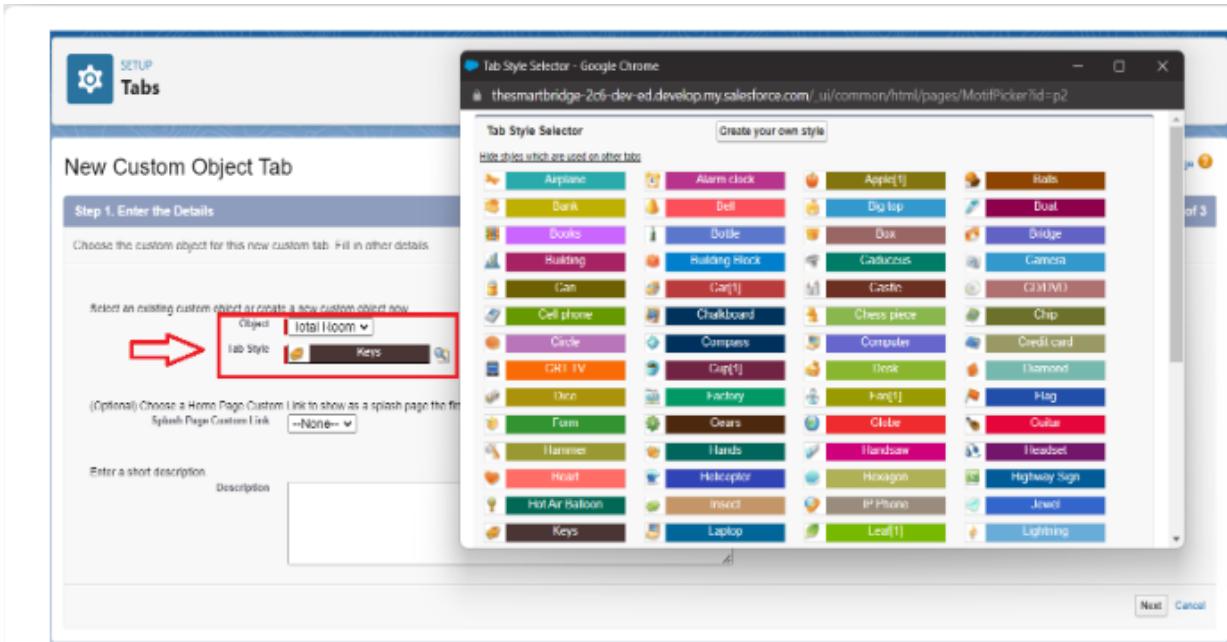
Activity1- Creating a Tab for Total Rooms

To create a Tab:(Total Rooms)

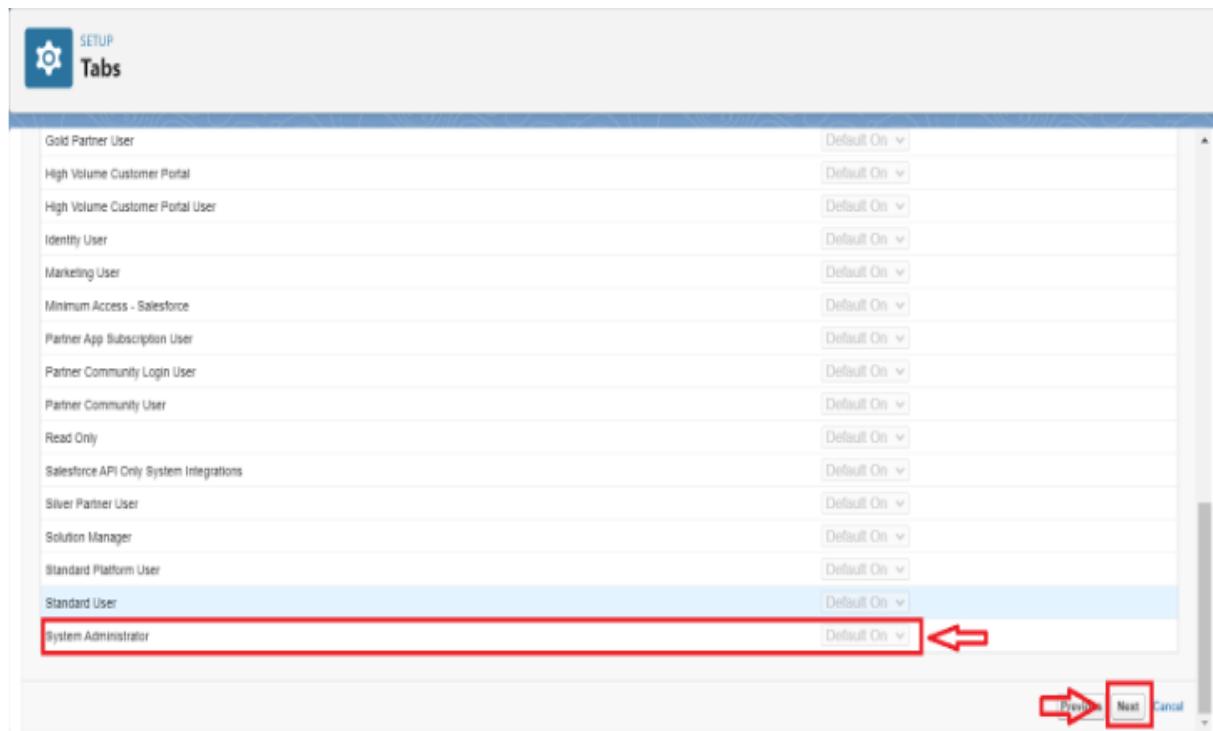
1. Go to setup page > type Tabs in Quick Find bar > click on tabs > New (under custom object tab)



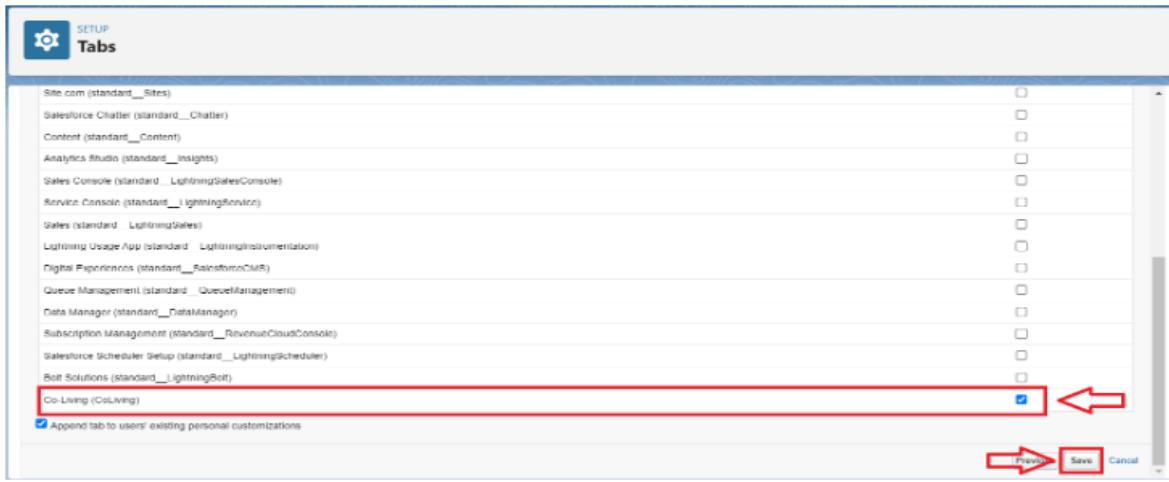
2. Select Object(Total Rooms) > Select the tab style.



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.

The screenshot shows the 'Lightning Experience App Manager' interface. In the top right, there's a red box around the 'New Lightning App' button. On the left, there's a red box around the 'Clone (Appx Beta)' link under the 'Setup' tab.

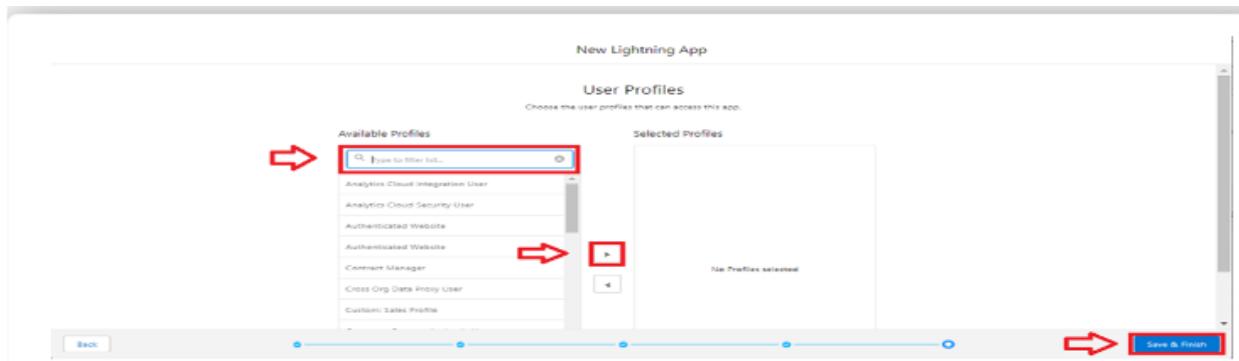
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.

The screenshot shows the 'New Lightning App' configuration page. In the 'App Details' section, there's a red box around the 'Name your app...' input field. At the bottom right, there's a red box around the 'Next' button.

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.

The screenshot shows the 'Navigation Items' configuration page. It displays two lists: 'Available Items' on the left and 'Selected Items' on the right. Between them are 'Move Up' and 'Move Down' arrow buttons. A red box highlights the 'Available Items' list, another highlights the 'Selected Items' list, and a third highlights the 'Move Up' and 'Move Down' arrows. At the bottom right, there's a red box around the 'Next' button.

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

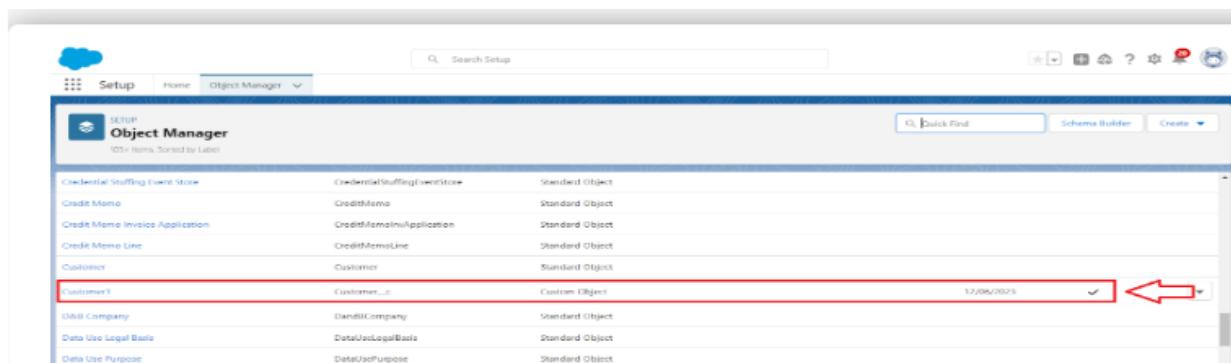
Custom Fields:

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 header, there's a toolbar with icons for 'New', 'Edit', 'Delete', 'Copy', 'Share', 'Help', and 'Print'. The main area is titled 'Object Manager' and displays a list of objects. A red arrow points to the 'Customer1' row, which is highlighted with a red border. The 'Customer1' row contains the following information:

Object Name	Label	Type
Customer1	Customer	Custom Object

A date field 'Last Modified' is visible at the bottom right of the list.

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

3. Select Data Type as a “Phone”

4. Click on next

5. Fill the Above as following:

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

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 box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Room Booking' row in the main list, which is also underlined. A red arrow points from the left towards the 'Room Booking' row. On the far right of the list, there is a date field set to '07/06/2023' with a dropdown arrow, and a red arrow points from the right towards this field.

Resource Absence	ResourceAbsence	Standard Object
Resource Preference	ResourcePreference	Standard Object
Return Order	ReturnOrder	Standard Object
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object
Return Order Item Tax	ReturnOrderItemTax	Standard Object
Return Order Line Item	ReturnOrderLineItem	Standard Object
Room Booking	RoomBooking_c	Custom Object
Scorecard	Scorecard	Standard Object
Scorecard Association	ScorecardAssociation	Standard Object

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

The screenshot shows the 'Fields & Relationships' page for the 'Room Booking' object. A red box highlights the 'Room Booking' object name in the top navigation bar. Another red box highlights the 'Fields & Relationships' tab in the left sidebar. A red arrow points from the left towards the 'Fields & Relationships' tab. On the right, there is a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains four rows of data. A red box highlights the 'New' button at the top right of the table, and a red arrow points from the right towards this button.

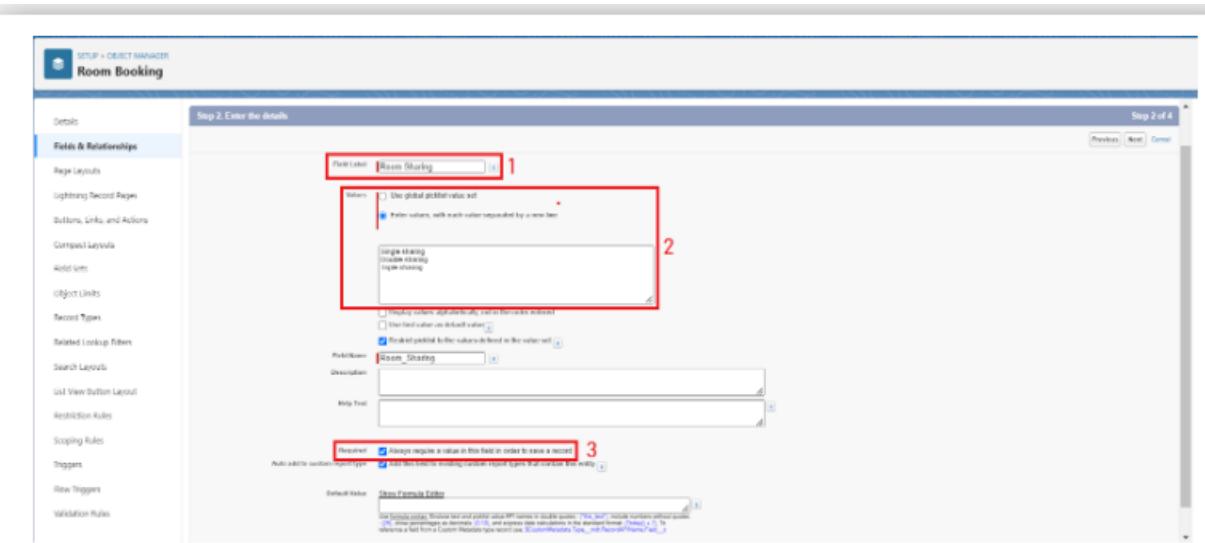
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
AE + HSD	AE__c	Checkbox		
Advance payment for month	Advance_payment_for_Month_c	Checkbox		
Amount	Amount_c	Currency(18, 0)		
Created by	CreatedBy	Lookup(User)		

3. Select Data Type as a “Picklist”

The screenshot shows the 'Data Types' selection page for the 'Room Booking' object. A red box highlights the 'Room Booking' object name in the top navigation bar. Another red box highlights the 'Fields & Relationships' tab in the left sidebar. A red arrow points from the left towards the 'Fields & Relationships' tab. On the right, there is a list of data types with their descriptions. A red box highlights the 'Picklist' option in the list, and a red arrow points from the right towards this option.

- 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
- URL

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

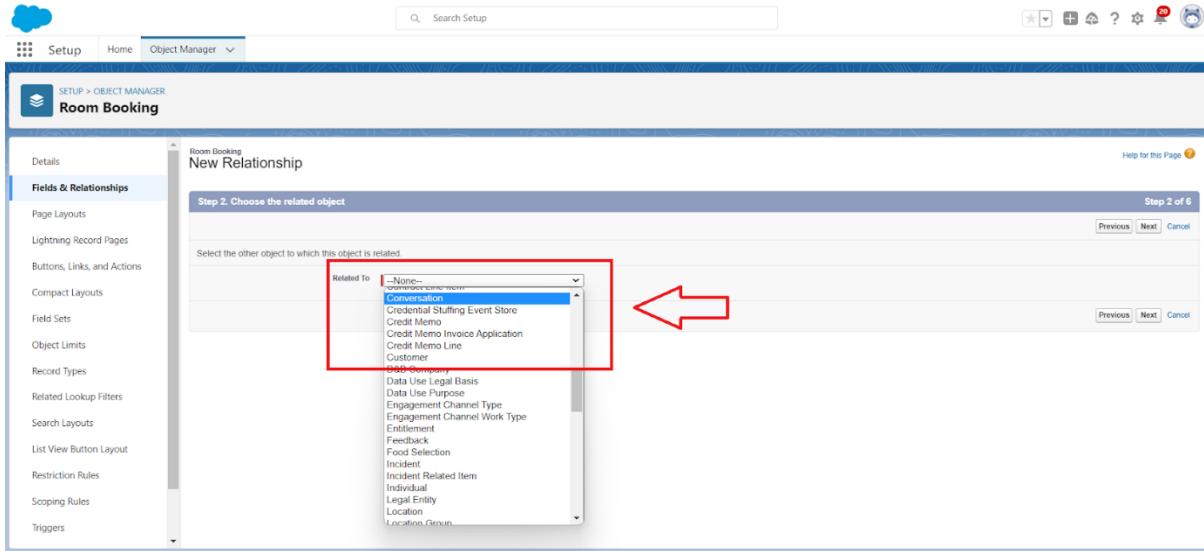
The screenshot shows the 'Fields & Relationships' page for the Room Booking object. A red arrow points to the 'Room Booking' object in the top left. Another red arrow points to the 'New' button in the top right corner of the table header.

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

4. Click on Next

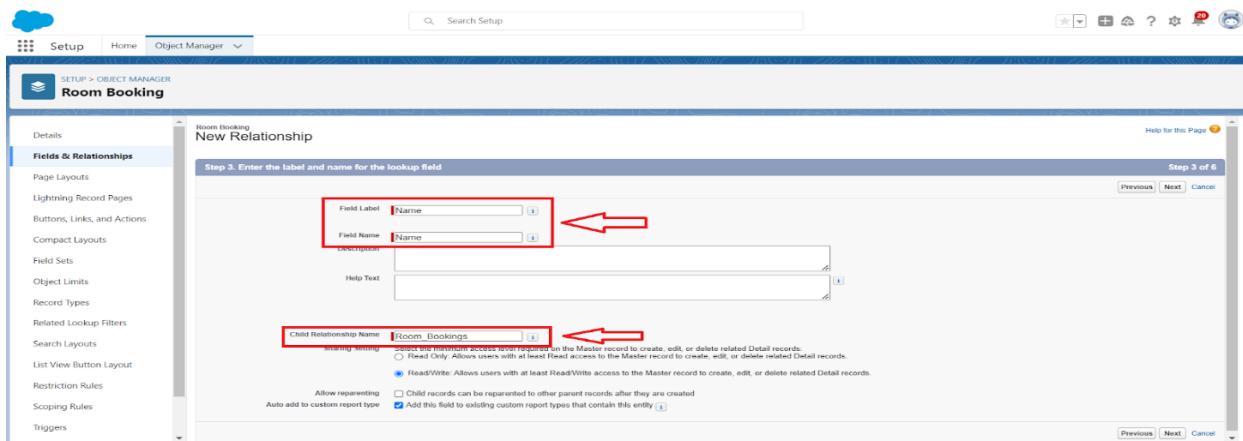
The screenshot shows the 'Create Custom Field' wizard, Step 2: Set Data Type. A red arrow points to the 'Room Booking' object in the top left. Another red arrow points to the 'Master-Detail Relationship' option in the list of data types. A third red arrow points to the 'Next Step' button in the bottom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

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



6.Fill the Above as following:

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



- Click on Next > Next > Save and new.

3.To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New

3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: AC-3000
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new

4. To create fields in an object:

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

5. To create fields in an object:

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

- Click on Next > Next > Save and new

6. To Create a Fields & Relationship to an Object

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Rooms” object and click on Next
- Fill the Above as following:
- Change the Field Label: Total No Of Rooms
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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

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

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

Total Room
New Custom Field

Step 3. Define the summary calculation Step 3 of 5

Select Object to Summarize

Master Object Total Room
Summarized Object Room Bookings ▾

Select Roll-Up Type

COUNT SUM MIN MAX

Field to Aggregate —None—

Filter Criteria

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

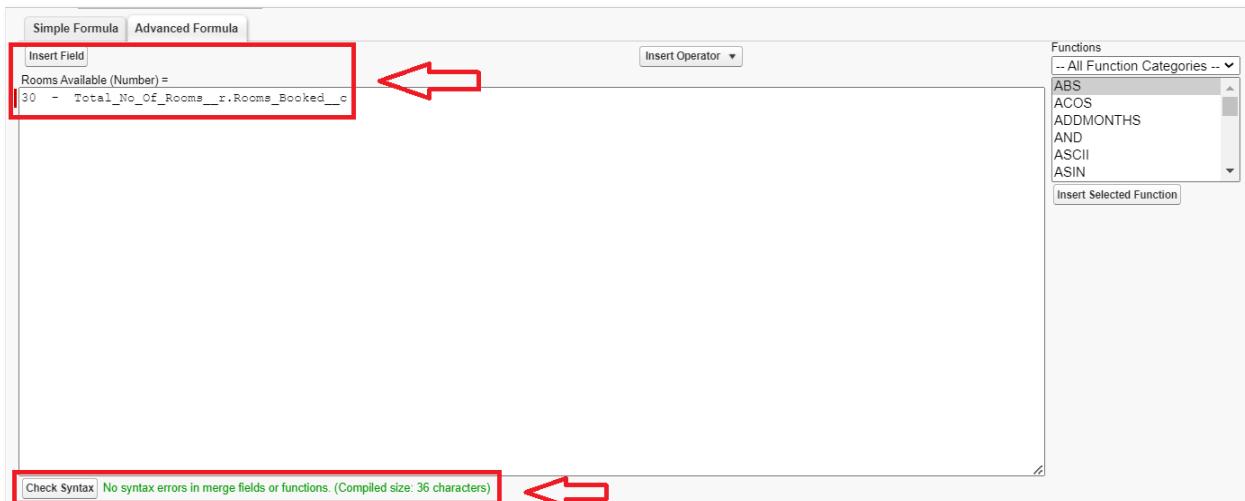
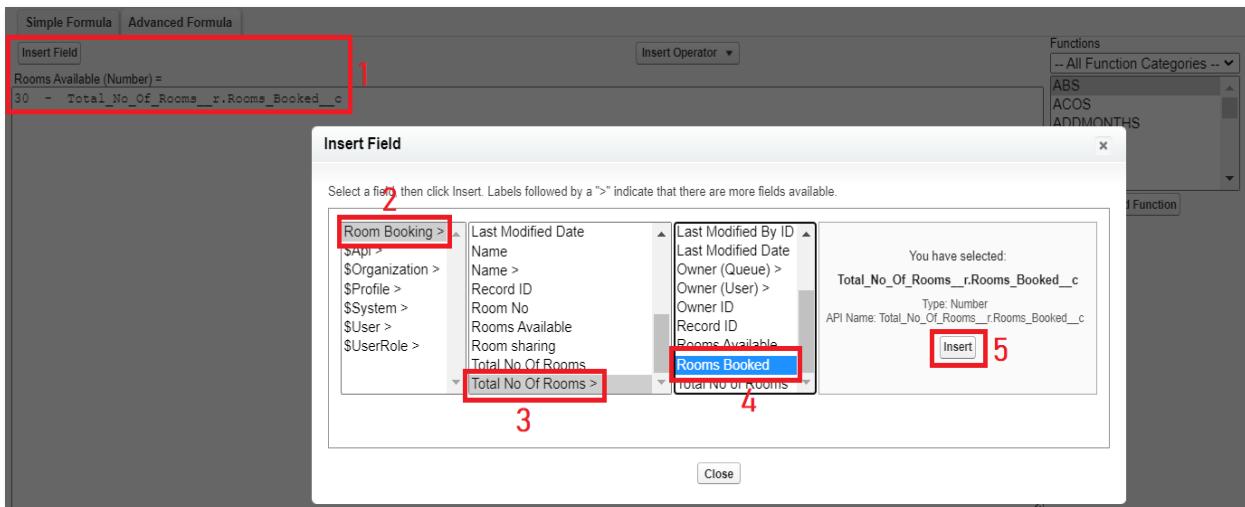
Help for this Page ?

Previous Next Cancel

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 is 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 is 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 third 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
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

SETUP > OBJECT MANAGER

Payment1

Fields & Relationships

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(Customer1)		✓
Payment ID	Payment_ID_c	Number(18, 0)		
Payment Mode	Payment_Mode_c	Picklist		
Payment no	Name	Auto Number		✓
Room Booking	Room_Booking_c	Lookup(Room Booking)		✓

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

SETUP > OBJECT MANAGER

Payment1

Fields & Relationships

Fields & Relationships

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

Data Type

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

Master-Detail Relationship

Creates a 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 pop-up list. The master object is the source of the values in the list.

External Lookup Relationship

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

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

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 pop-up calendar.

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.
- The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar.

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.
- The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar.

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.

Setup Home Object Manager

Object Manager 153+ items, Sorted by Label

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

Setup Home Object Manager

Object Manager Payment1

Fields & Relationships 8 Items, Sorted by Field Label

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

3. Select Data Type as a “Lookup Relationship”

4. Click on Next

Setup Home Object Manager

Object Manager Payment1

Fields & Relationships

Select 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

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.

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

The relationship field is required on all detail records.

The relationship field is determined by the master object and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The relationship field is determined by the master object and another object (the parent, or "master") where:
- When a user deletes the master record, all detail records are deleted.
- You can use the summary field to calculate the total sum of all detail records.
- The relationship field allows users to click on a lookup icon to select a value from a pop-up list.

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

Allows users to select a True (checked) or False (unchecked) value.

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

Allows users to enter a date or pick a date from a pop-up calendar.

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

The image consists of two screenshots of the Salesforce Object Manager interface, showing the process of creating a new relationship between the Payment1 object and the Room Booking object.

Screenshot 1: Step 2. Choose the related object

In this step, the user is selecting the related object from a dropdown menu. The dropdown is titled "Related To" and contains several options, including "Room Booking". The "Room Booking" option is highlighted with a red box and has a red arrow pointing to it from the left.

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

In this step, the user is entering metadata for the lookup field. The "Field Label" is set to "Room Booking" and the "Field Name" is set to "Room_Booking". Both of these fields are highlighted with red boxes and have red arrows pointing to them from the left.

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.

Object Name	Label	Type	Last Modified Date
Payment1	Payment_c	Custom Object	06/06/2023
Price Book	Pricebook2	Standard Object	
Price Book Entry	PricebookEntry	Standard Object	
Problem	Problem	Standard Object	
Problem Related Item	ProblemRelatedItem	Standard Object	
Process Exception	ProcessException	Standard Object	
Product	Product2	Standard Object	

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

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

3. Select Data Type as a “Picklist”

Field Label: Payment Mode

Data Type: Picklist

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

Cross Object Formula Field:

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

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

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

4. Create a Cross object formula Field in Payment1 Object

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various objects like Payment Authorization, Payment Gateway, etc. The main area shows a table with columns: Name, Label, and Type. The 'Payment1' row is highlighted with a red box. In the top right, there are buttons for Quick Find, Schema Builder, and Create. A red arrow points to the 'Edit' button in the top right corner of the object row.

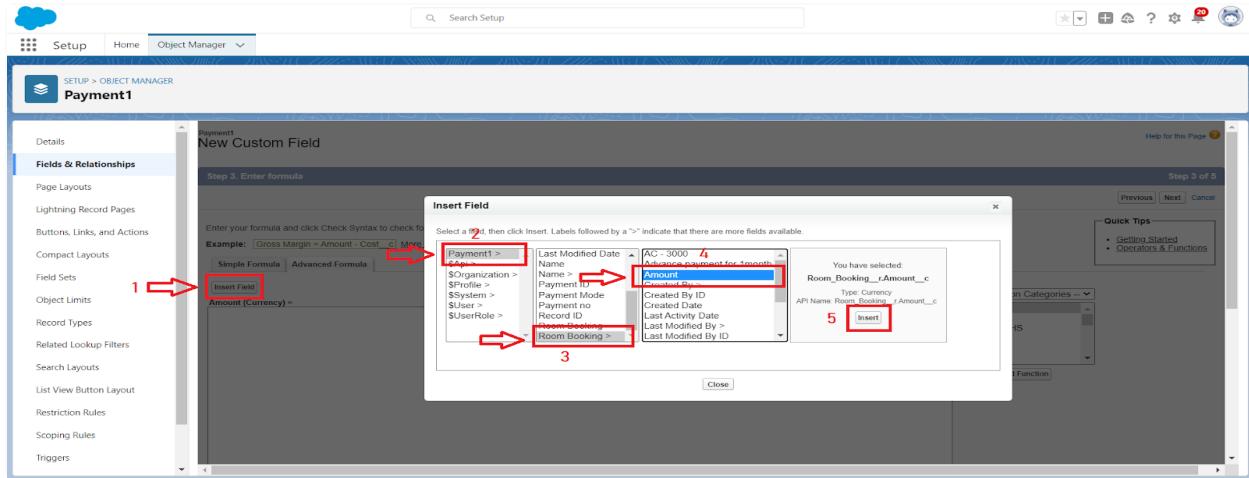
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Formula”
4. Click on Next

The screenshot shows the 'Fields & Relationships' creation page for 'Payment1'. The 'Data Type' section is expanded, showing options like None Selected, Auto Number, Formula, Lookup Relationship, Master-Detail Relationship, and External Lookup Relationship. The 'Formula' option is selected and highlighted with a red box. A red arrow points to its detailed description below.

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

The screenshot shows the 'Formula' configuration page for 'Payment1'. The 'Field Label' is set to 'Amount' and 'Field Name' is auto-generated as 'Amount'. The 'Formula Return Type' is set to 'Currency', which is highlighted with a red box. A red arrow points to its detailed description below.

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

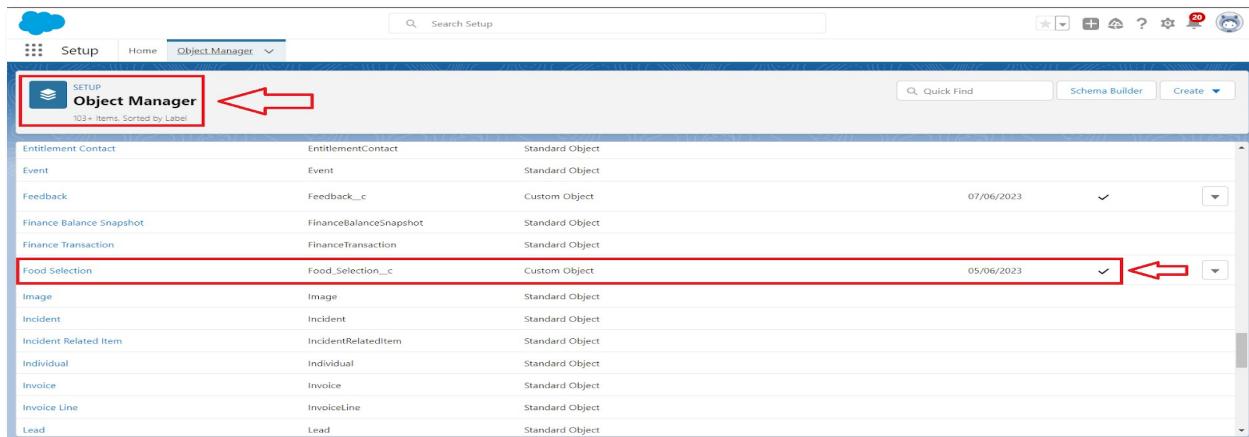


- Click on the Check syntax: No syntax errors in merge fields
- Click on Next > Next > Save and new.

Activity4 - Creation of fields for the Food Selection object

- 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.



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

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

6. Fill the Above as following:

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

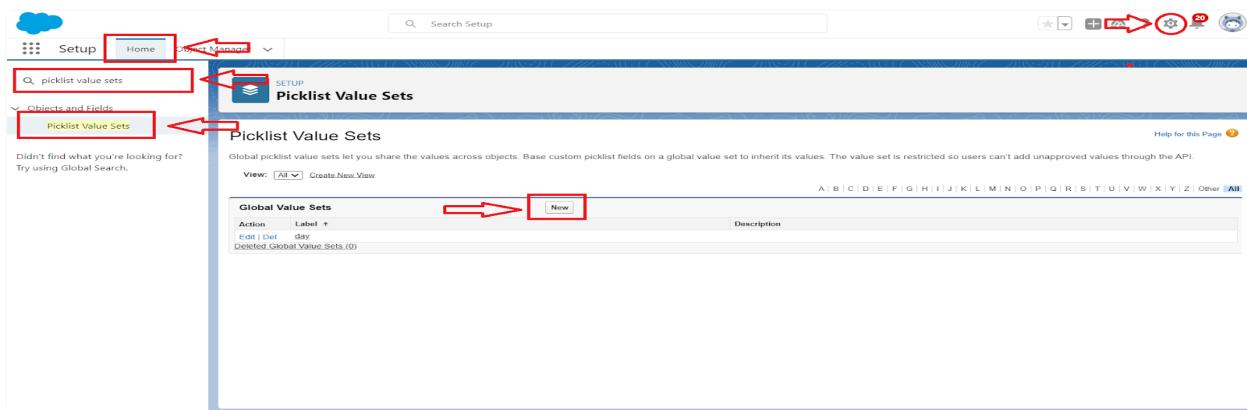
- Click on Next > Next > Save and new.

Picklist value sets:

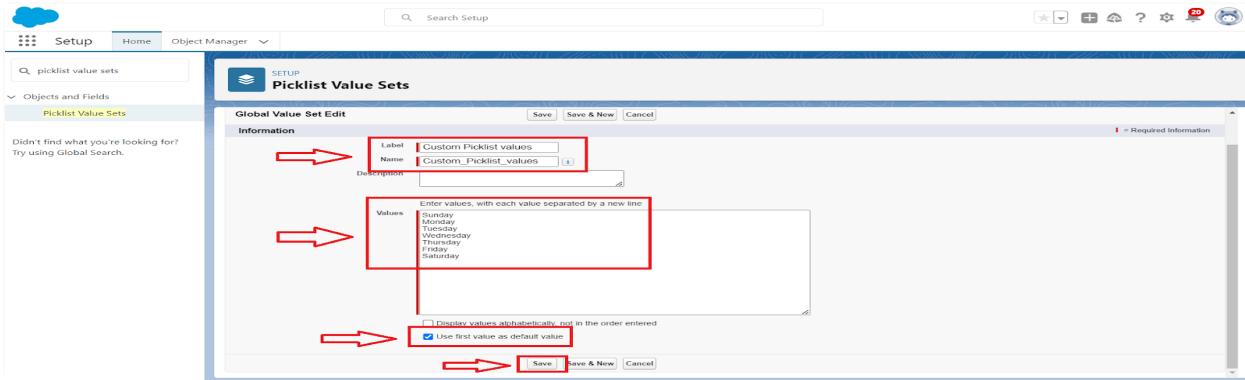
Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

Create a picklist value set:

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



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

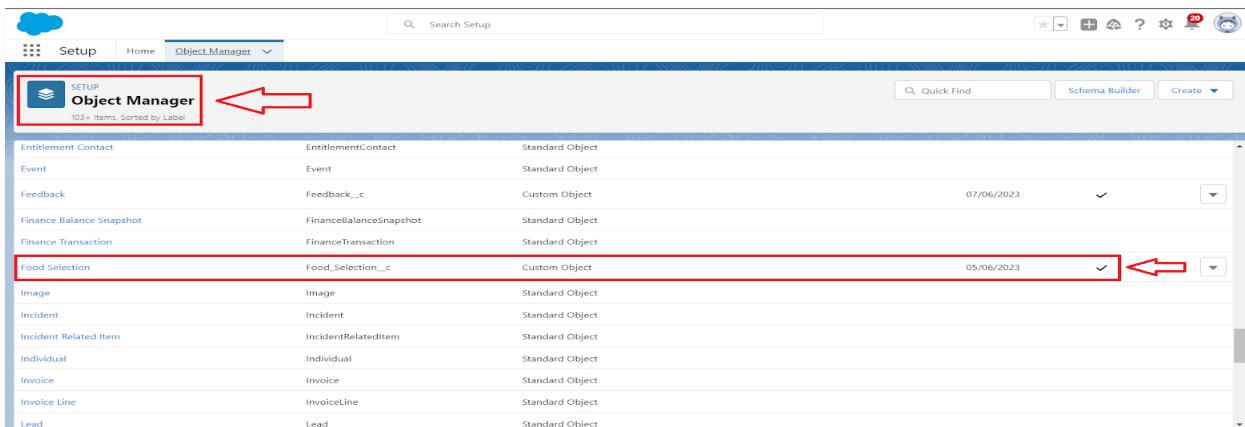


6. Check the Use first value as default value and Click on save.

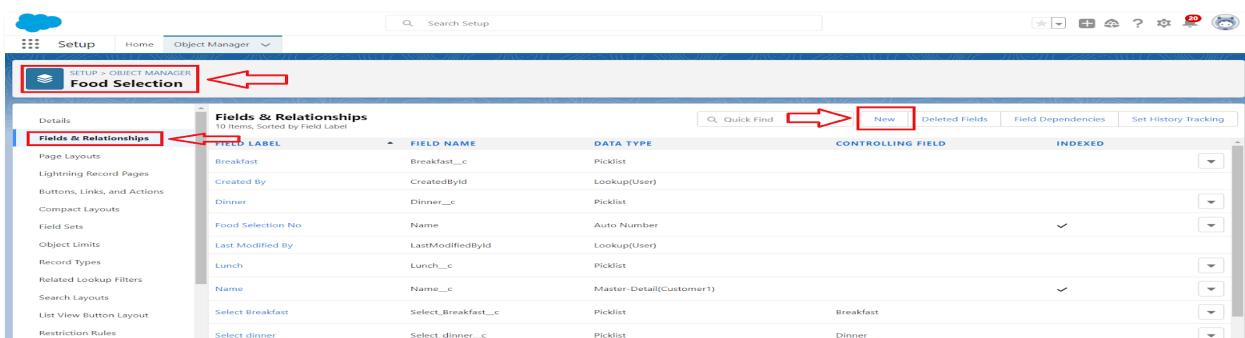
2. Create a picklist Field for Food selection object

To create fields in an object:

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



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



3. Select Data Type as a “Picklist”

4. Fill the Above as following:

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

3. Create a another picklist Field for Food selection object

To create fields in an object :

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

- 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

Field Label: Select Breakfast

Values:
Ida
Dosa
Dome
Vada
Bir
Chapati

Use first value as default value

Field Name: Select_Breakfast

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", "Type". Include numbers without quotes. To reference a field from a Custom Metadata Type record use <CustomMetadata Type>__rd RecordAPIName Field>_id

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.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Food Selection' row in the list, and a red arrow points to the 'Edit' button in the top right corner of the row. The 'Food Selection' row contains the label 'Food_Selection__c' and the modified date '05/06/2023'.

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

3. Now Click on New Option

The screenshot shows the 'Food Selection Field Dependencies' page. A red box highlights the 'New' button in the top right corner of the table. The table lists three dependencies:

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.

The screenshot shows the 'Food Selection Field Dependencies' page with a focus on the 'Sunday' column. A red box highlights the 'Select Breakfast' button in the 'Controlling Field' column for Sunday. A red arrow points to the 'Save' button at the top right. Below the table, a legend indicates 'Included Value' (yellow background) and 'Excluded Value' (white background). A red box highlights the 'Include Values' button in the bottom right corner of the table area. The table shows the following data:

Day	Controlling Field	Dependent Field
Sunday	Select Breakfast	Idli Dosa Vada Puri Chapati
Monday		Dosa Vada Puri Chapati
Tuesday		Idli Dosa Vada Puri Chapati
Wednesday		Idli Dosa Vada Puri Chapati
Thursday		Dosa Vada Puri Chapati

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

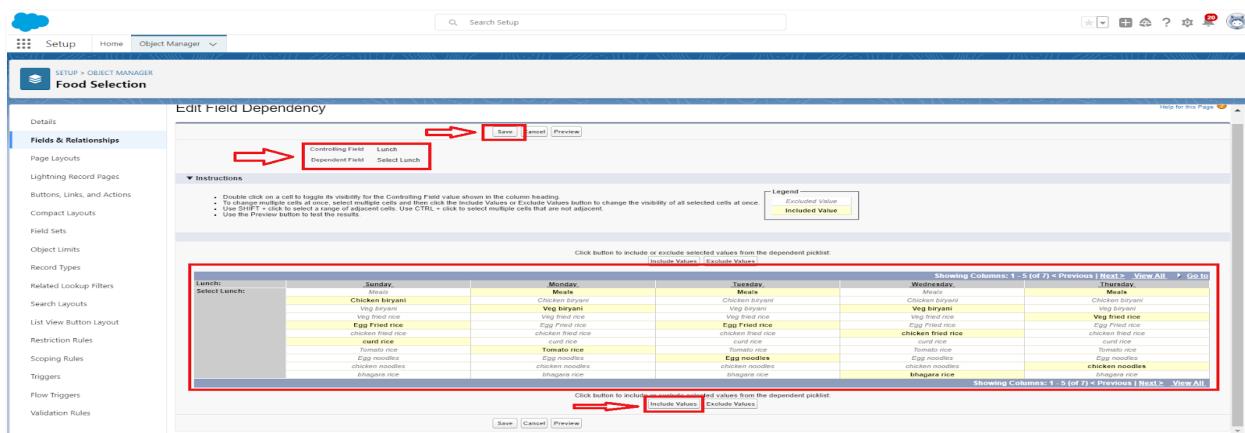
10. Chicken Noodles

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 in the Salesforce Setup. The 'Controlling Field' is set to 'Dinner' and the 'Dependent Field' is set to 'Select dinner'. The 'Sunday' column is selected, showing a picklist with values: Chicken biryani, Veg biryani, Veg fried rice, Egg Fried rice, chicken fried rice, curd rice, Tomato rice, Egg noodles, chicken noodles, bhagara rice. Red arrows point to the 'Save' button at the top right, the 'Controlling Field' dropdown, the 'Dependent Field' dropdown, and the 'Include Values' button in the picklist.

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 under the 'Object Manager' tab. The 'Feedback' object is selected, indicated by a red box around its row. The 'Created Date' field for 'Feedback' is highlighted with a red box and a red arrow pointing to it from the right.

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

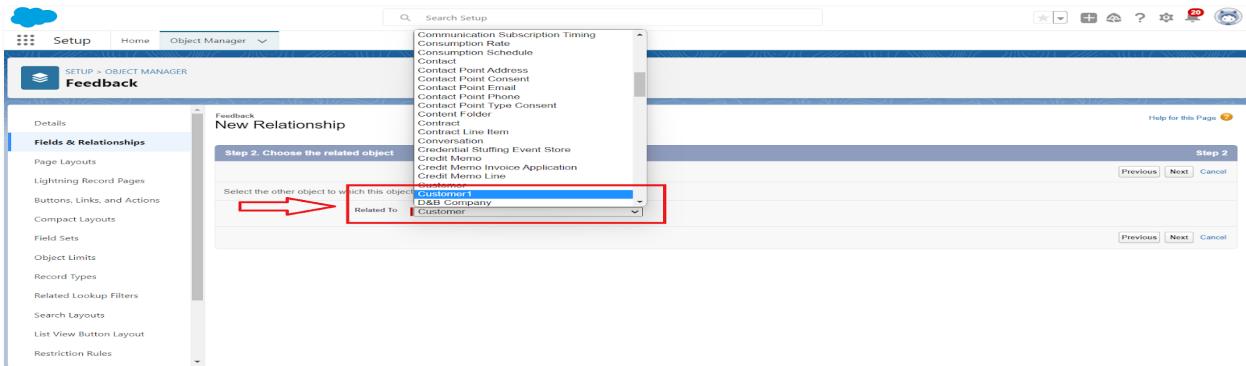
The screenshot shows the 'Fields & Relationships' page for the 'Feedback' object. The 'Fields & Relationships' section is selected, indicated by a red box. The 'New' button in the top right corner is highlighted with a red box and a red arrow pointing to it from the right.

3. Select Data Type as a “Lookup Relationship”

4. Click on Next

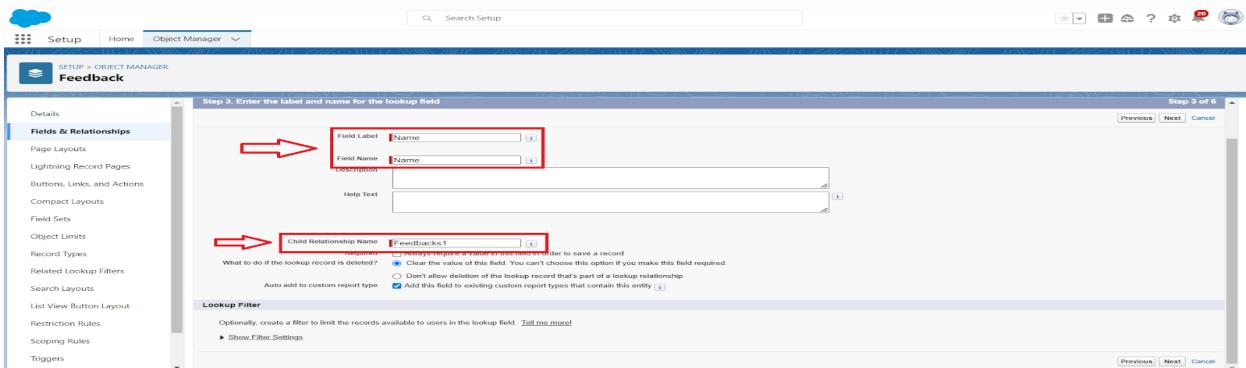
The screenshot shows the 'Data Type' configuration step in the 'Fields & Relationships' creation wizard. The 'Lookup Relationship' option is selected, indicated by a red box. A red arrow points to the 'Lookup Relationship' option from the left sidebar.

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



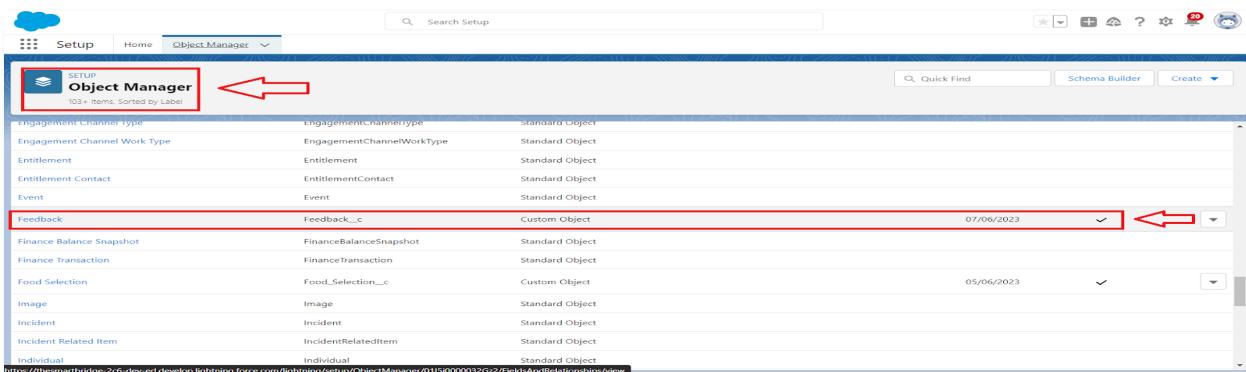
6. Fill the Above as following:

- 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		
Houscleaning	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

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

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

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

4. Click on Next

Setup > Object Manager > Feedback

Fields & Relationships

Field Label: Roomcleaning

Values:

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

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 quotes. Reference a field from a Custom Metadata type record using \$CustomMetadataType__r.Records[Name].Field__v

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.

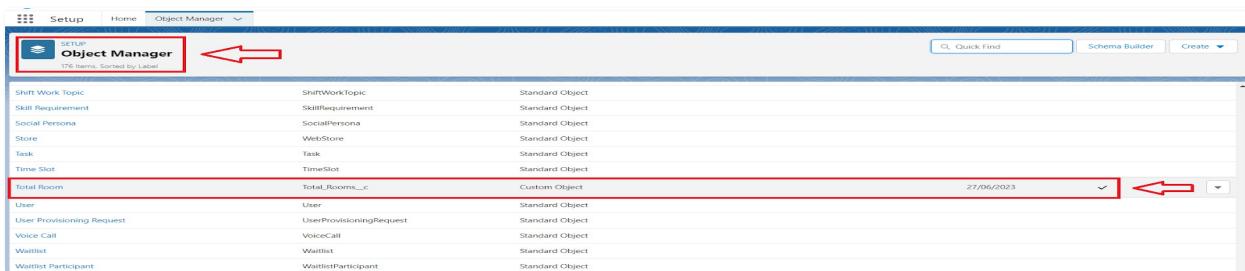
5. To create a Another Fields in an Same Object

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.

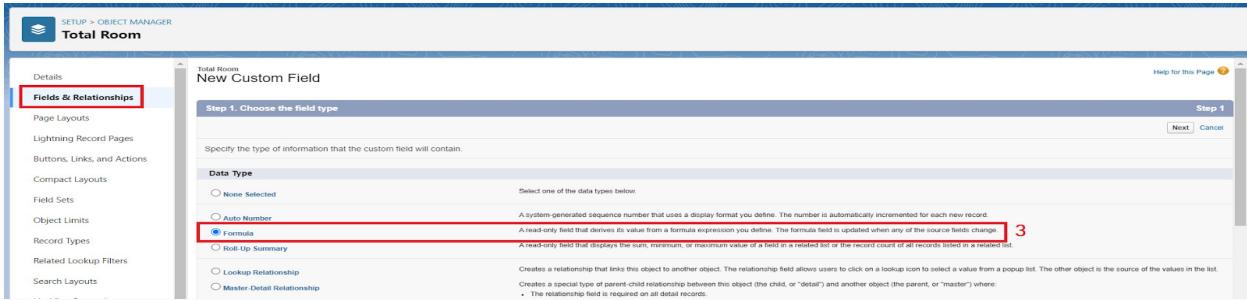
Activity6 - Creation of fields for the Total Rooms object

To create fields in an object:

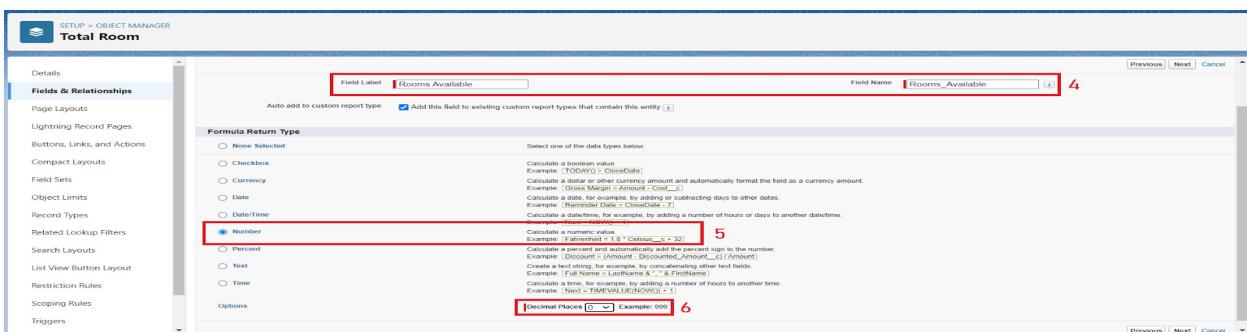
1. Go to setup > click on Object Manager > type object name(Total Rooms) in search bar > click on the object.



2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next



4. Fill the Above as following:
5. Field Label: Rooms Available
6. Field Name : It's gets auto generated
7. Select the Formula Return Type as “Number”
8. Select the Decimal places as “0” and Click on Next



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

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



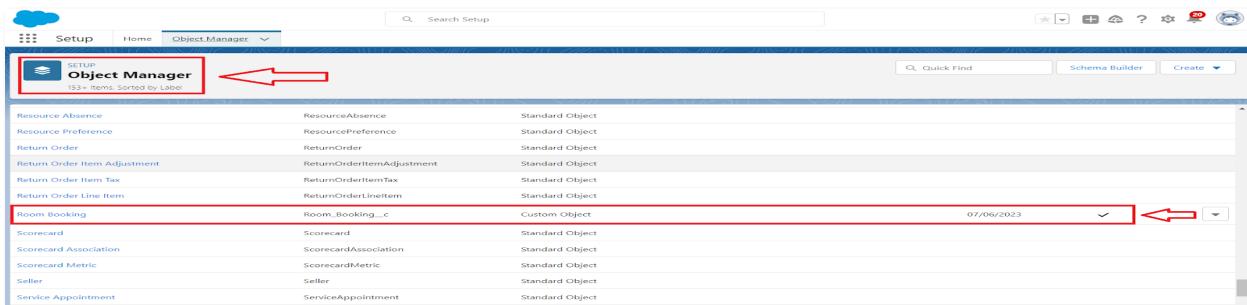
10. Click on Next > Next > Save and new.

Task6 - Validation rule

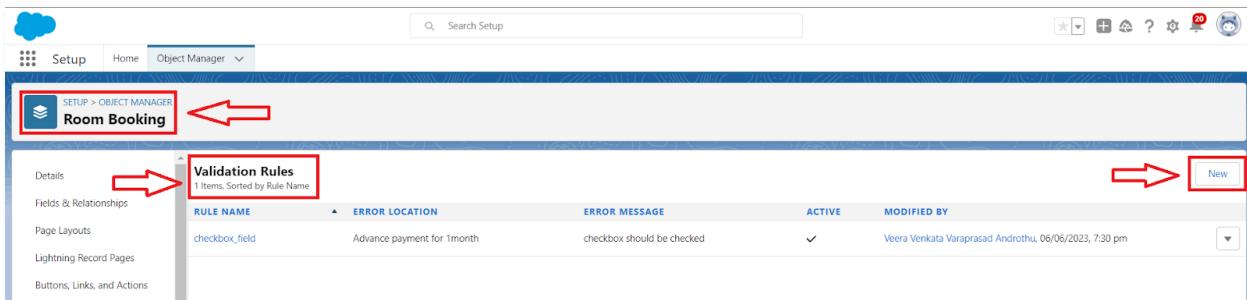
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

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.

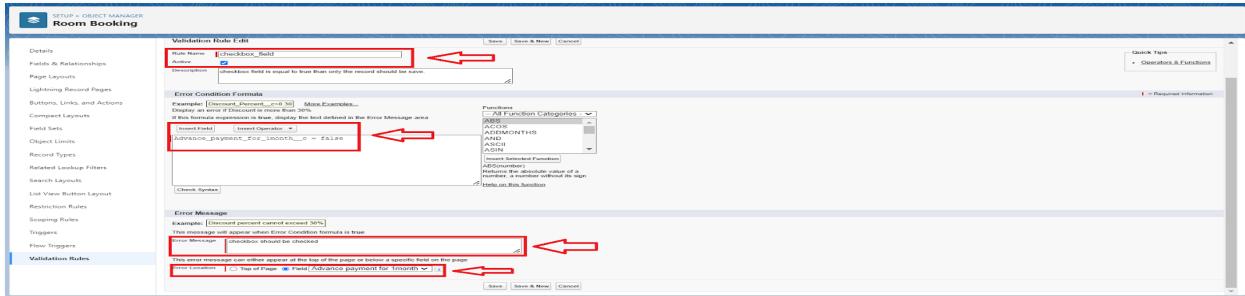


2. Now click on “Validation rule” at top > New.



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”

- Select error location as field(Advance payment for 1month)



- Click on save.

Activity2 - create a Another validation rule to an Room Booking Object

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

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

2. Custom Profiles:

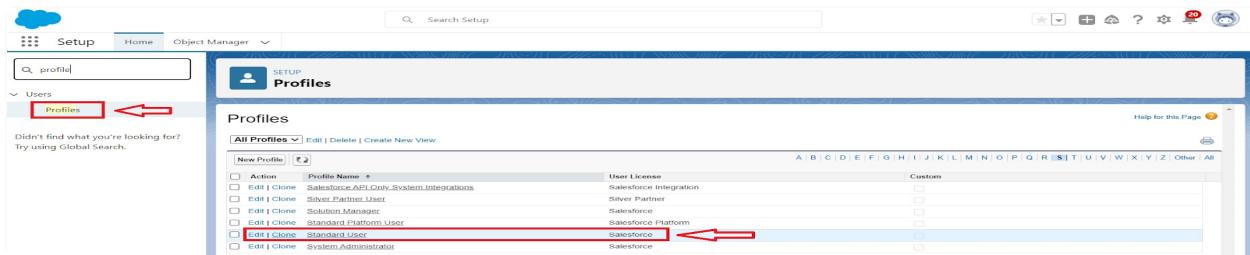
Custom ones defined by us.

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

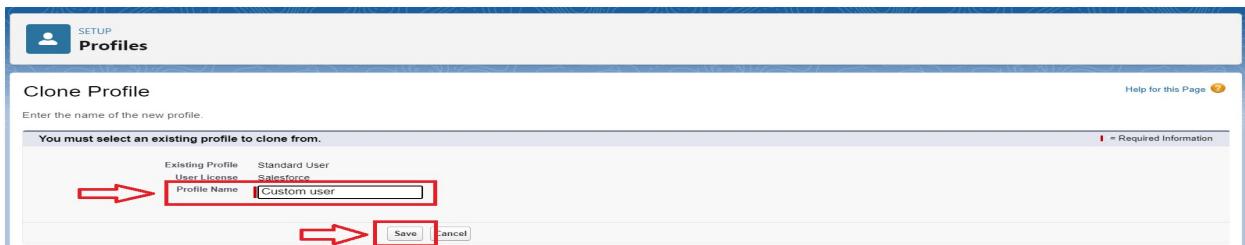
Activity1 - Custom user Profile

To create a new profile:

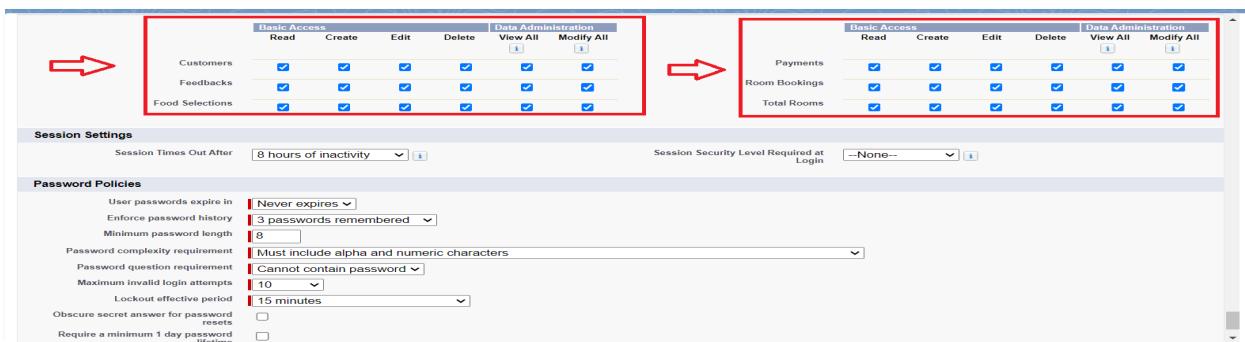
1. Go to setup > type profiles in quick find box > click on profiles > clone the desired profile (Standard User)



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.



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.
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' for different profiles. Each section has a red box around it and a red arrow pointing to it from the left.

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

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

Below these sections are 'Session Settings' and 'Password Policies' configuration fields.

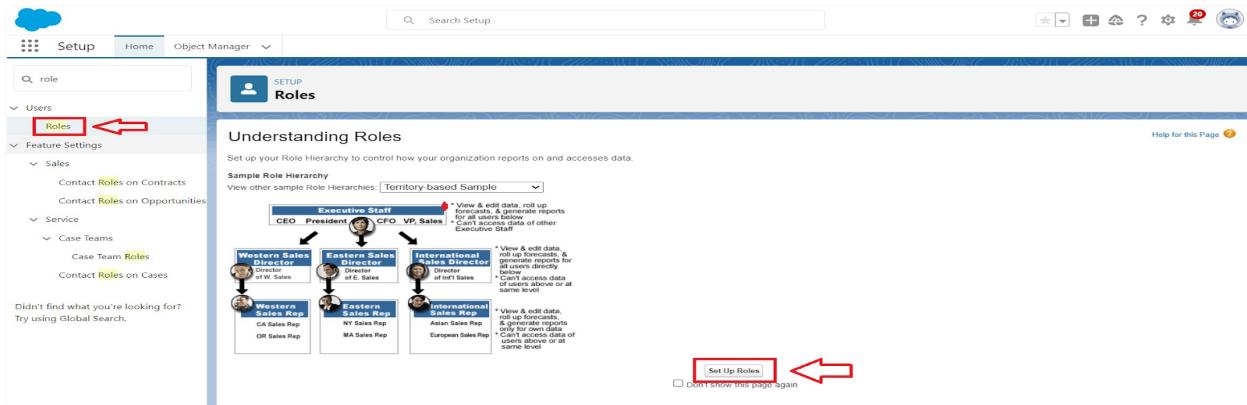
- 5.Scroll down and Click on Save.

Task8 - Roles

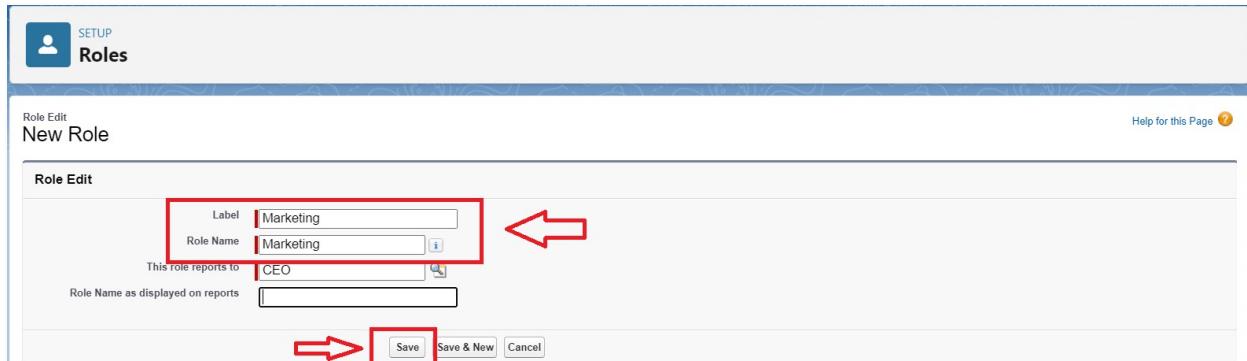
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity1 - Marketing Role

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



2. Click on Expand All and click on add role under CEO role.
3. Give Label as “Marketing” and Role name gets auto populated.



4. Then click on Save.

Activity2 - Receptionist Role

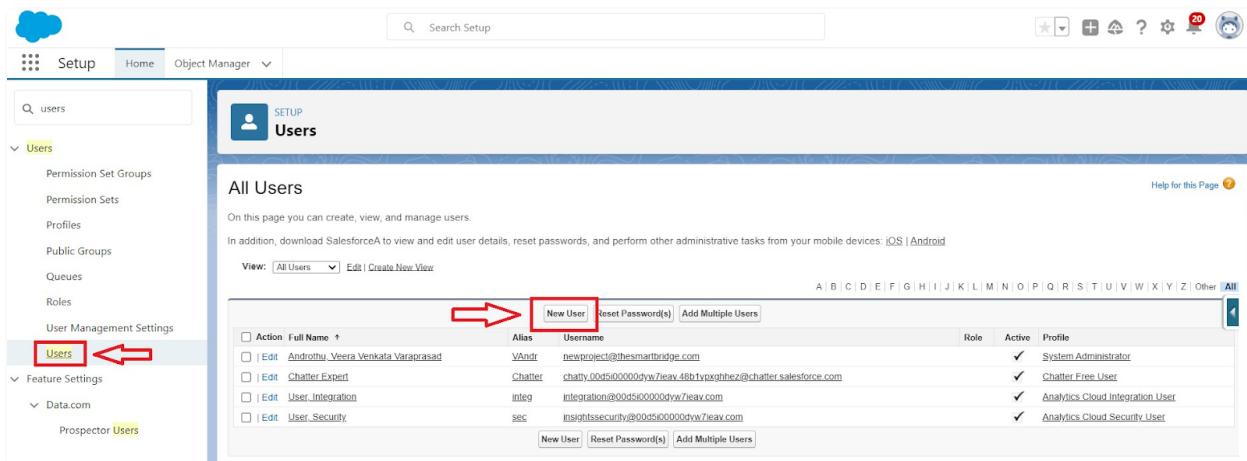
1. Go to quick find > Search for Roles > click on set up roles.
2. Click on Expand All and click on add role under CEO role.
3. Give Label as “Receptionist” and Role name gets auto populated.
4. Then click on Save.

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. On the left, there is a sidebar with various options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. Under Feature Settings, 'Data.com' is expanded, and 'Prospector' is selected. A red arrow points to the 'Users' link under Feature Settings. The main area is titled 'Users' and shows a table of 'All Users'. At the top of the table, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red box highlights the 'New User' button. The table lists several users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The first user listed is 'Androthy Veera Venkata Varaprasad' with alias 'VAndr' and username 'newproject@thesmarbridge.com'. Other users include 'Chatter_Expert', 'User_Integration', 'User_Security', and several system users like 'integ' and 'sec'.

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' setup page in Salesforce. The 'General Information' section on the left contains fields for First Name, Last Name, Alias, Email, Username, and Nickname. The 'Role' and 'User License' sections on the right contain dropdown menus for selecting roles like CEO and user licenses like Salesforce.

3. save.

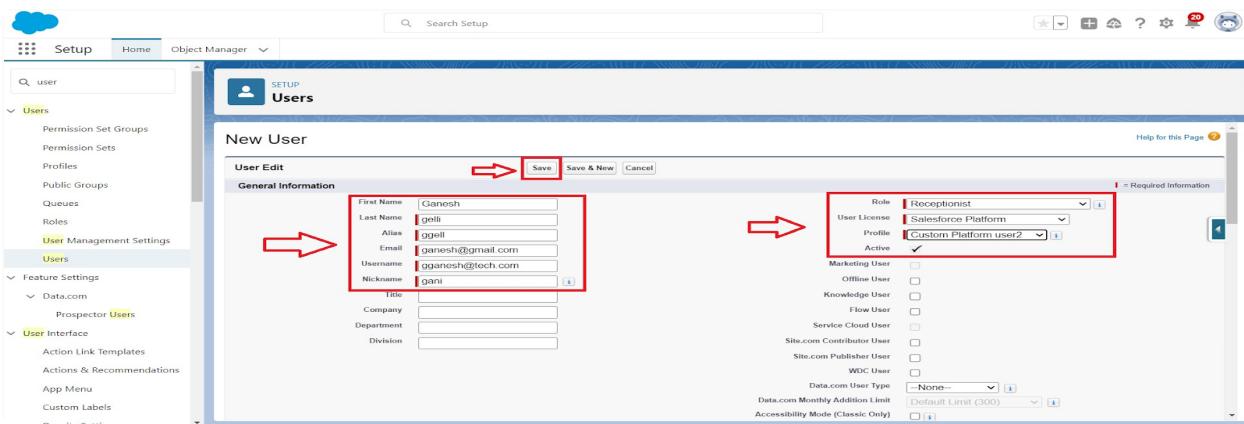
Activity2 - Create Another User

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
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

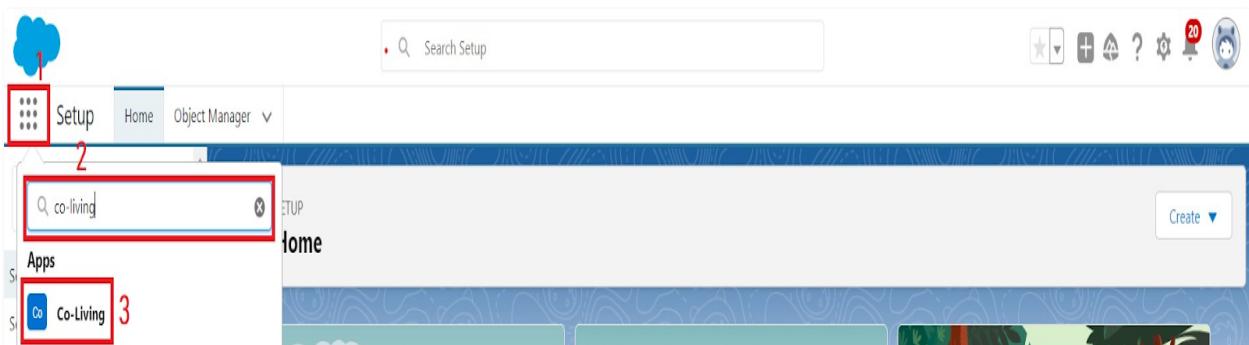


3. Save

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.



- Click on the Customers Tab.

New Customer1

Information

* Customer Name
Text

* Phone no
9702874232

Email id
tech@gmail.com

Owner
Veera Venkata Varaprasad Androthu

* Permanent Address
Hyderabad

* current Status
Employee

Cancel Save & New Save

- Click new and fill details & Save

Activity2 - View a Record (Customers)

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

Home Feels Home Customers Room Bookings Payments Food Selections Feedbacks Reports Dashboards

Customer1 sandeep

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

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.

The screenshot shows the Salesforce interface for managing customers. At the top, there's a navigation bar with tabs like 'Co-Living', 'Home', 'Customers' (which is highlighted with a red box), 'Room Bookings', 'Payments', 'Food Selections', 'Feedbacks', 'Reports', and 'Dashboards'. Below the navigation is a search bar with placeholder 'Search this list...' and various filter and sort icons. The main area is titled 'Recently Viewed' with a dropdown arrow. It lists 5 items updated 2 minutes ago, each with a checkbox and a name: 1. sandeep (highlighted with a red box), 2. Abhilash, 3. Ganesh, 4. suman, and 5. Prasad. To the right of the list is a vertical toolbar with icons for 'New', 'Import', 'Change Owner', a search bar, and other list management tools. A context menu is open over the first item ('sandeep'), with options 'Edit' (highlighted with a red box) and 'Delete' (also highlighted with a red box). A callout box points to the 'Delete' option.

Tasak11 - Reports

Introduction:

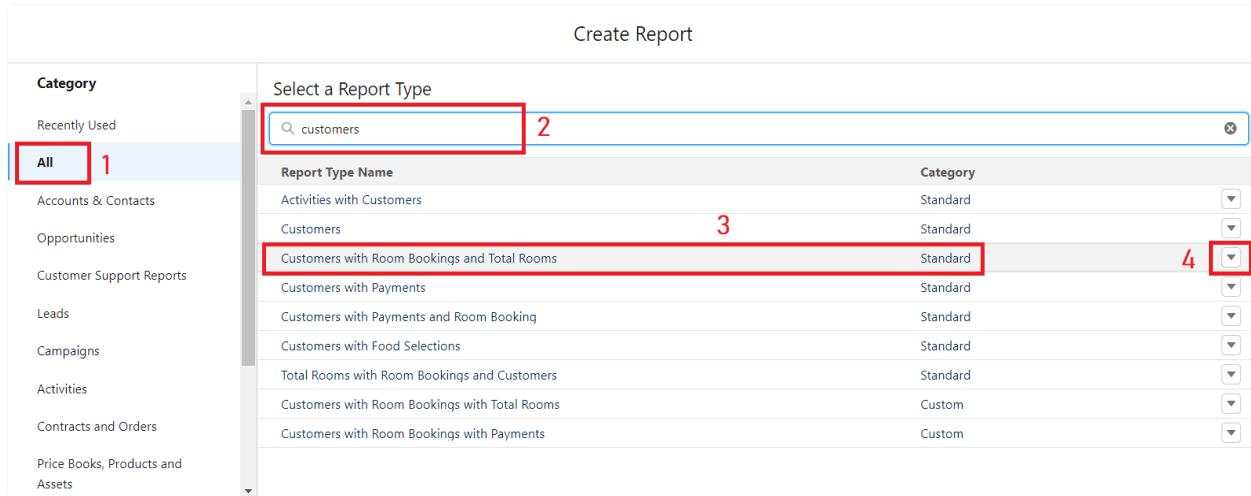
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

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.
- 3.Select report type from category or from report type panel or from search panel
“Customers with Room Bookings with Total Rooms ” > click on start report.



- 4.Customize your report
- 5.Add fields from left pane as shown below
- 6.Save or run it.

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.

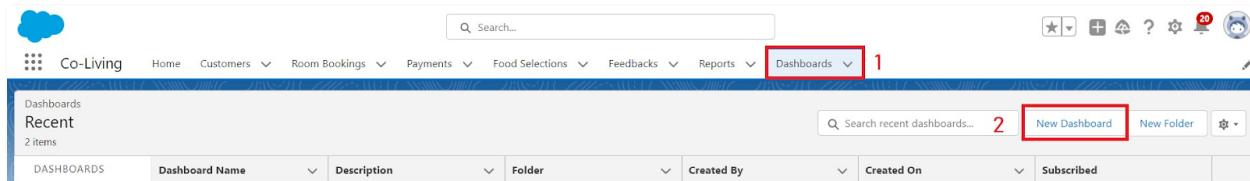
Task12 - Dashboards

Introduction:

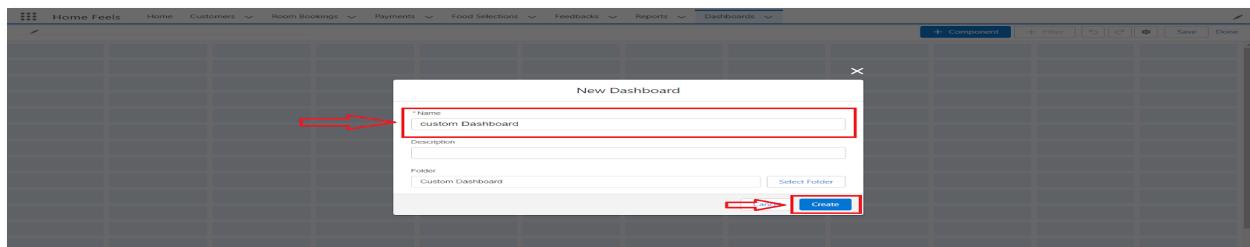
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing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

Activity1 - Create Dashboard

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

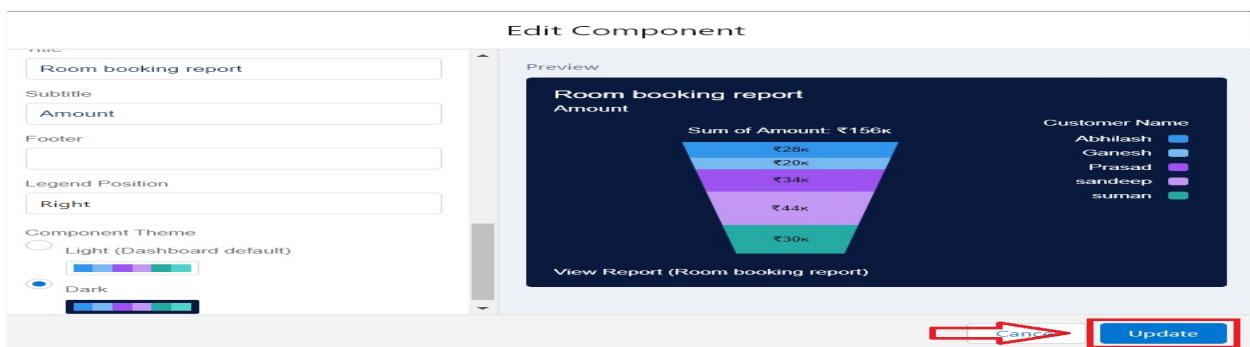


2. Give a Name and click on Create.



3. Select add component.

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



- 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:

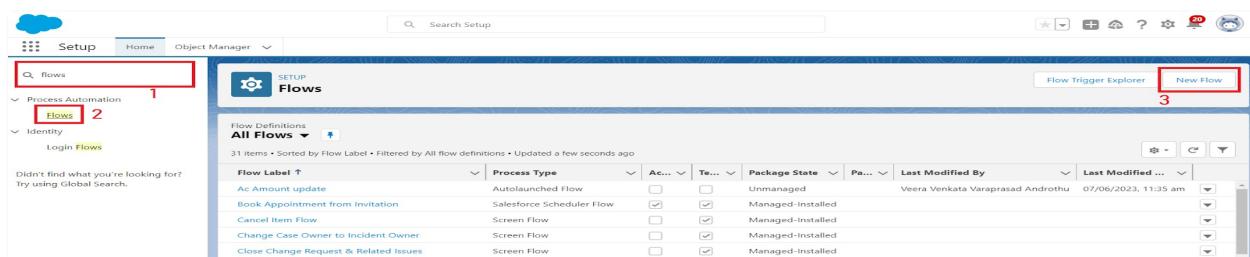
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

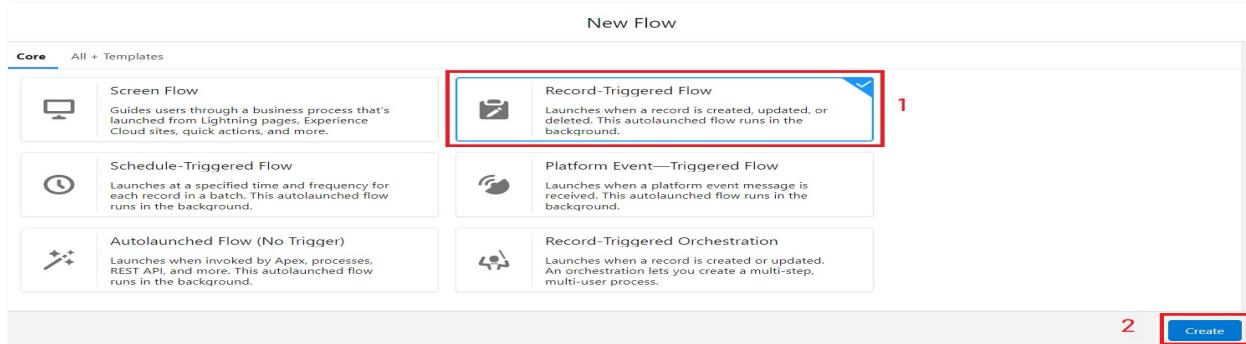
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Activity1 - Create a Flow

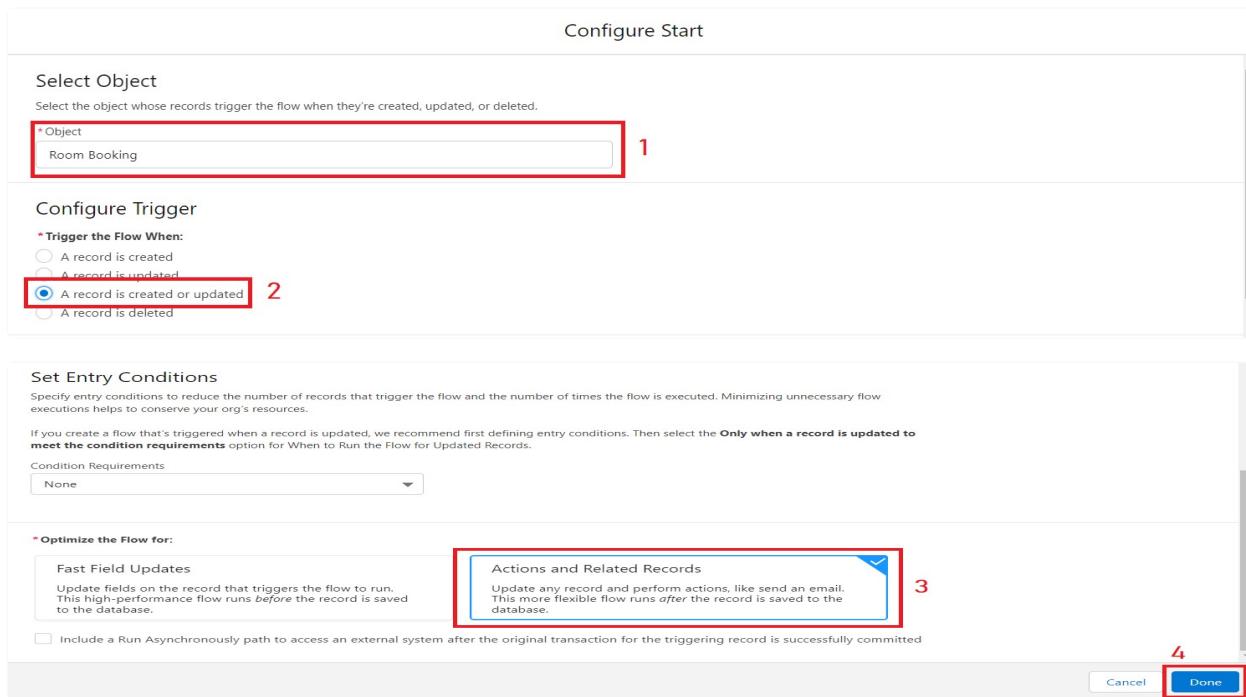
- Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.



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



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



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

The screenshot shows the 'New Decision' dialog box. At the top, there is a 'Label' field containing 'Field Should be Update' and an 'API Name' field containing 'Field_Should_be_Update'. Below this, a 'Description' field has the number '1' highlighted. The main area is titled 'Outcomes' with the sub-section 'OUTCOME ORDER'. A red box highlights the 'OUTCOME ORDER' section, which contains a '+' button and the number '4'. Below this is the 'OUTCOME DETAILS' section, also highlighted with a red box. It contains a 'Label' field with 'Single Sharing' and an 'Outcome API Name' field with 'Single_Sharing'. Underneath is a 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)', highlighted with a red box. The condition details are shown in a table:

Resource	Operator	Value
\$Record > Room sharing	Equals	single sharing
AND \$Record > AC - 3000	Operator	False

At the bottom right of the dialog are 'Cancel' and 'Done' buttons.

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 1 + 3

OUTCOME DETAILS

1 *Label Double sharing *Outcome API Name Double_sharing

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

2

Resource: \$Record > Room sharing	Operator: Equals	Value: Double sharing
AND Resource: \$Record > AC - 3000	Operator: Equals	Value: False

Delete Outcome

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.

OUTCOME ORDER 1 + 3

OUTCOME DETAILS

1 *Label Triple Sharing *Outcome API Name Triple_Sharing

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

2

Resource: \$Record > Room sharing	Operator: Equals	Value: Triple sharing
AND Resource: \$Record > AC - 3000	Operator: Equals	Value: False

Delete Outcome

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 0 + 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: \$Record > AC - 3000	Operator: Equals	Value: !\${GlobalConstant:True}

Default Outcome

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 0 + 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: \$Record > AC - 3000	Operator: Equals	Value: !\${GlobalConstant:True}

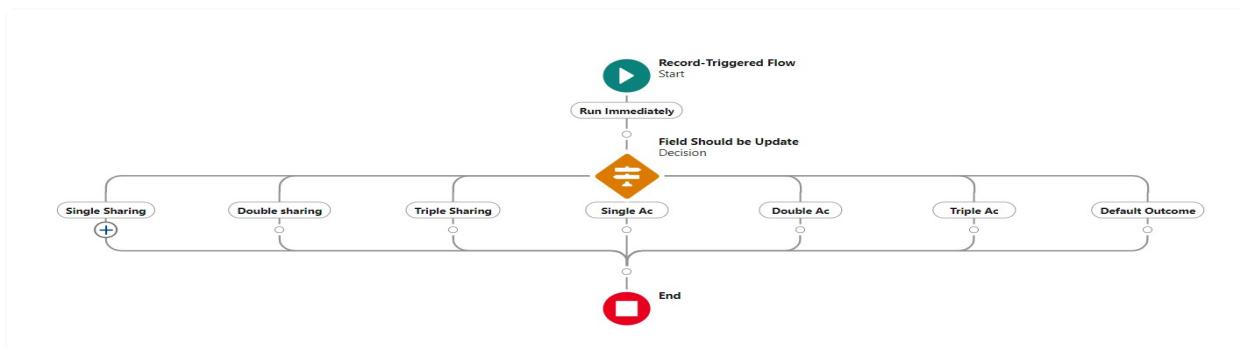
Default Outcome

Delete Outcome

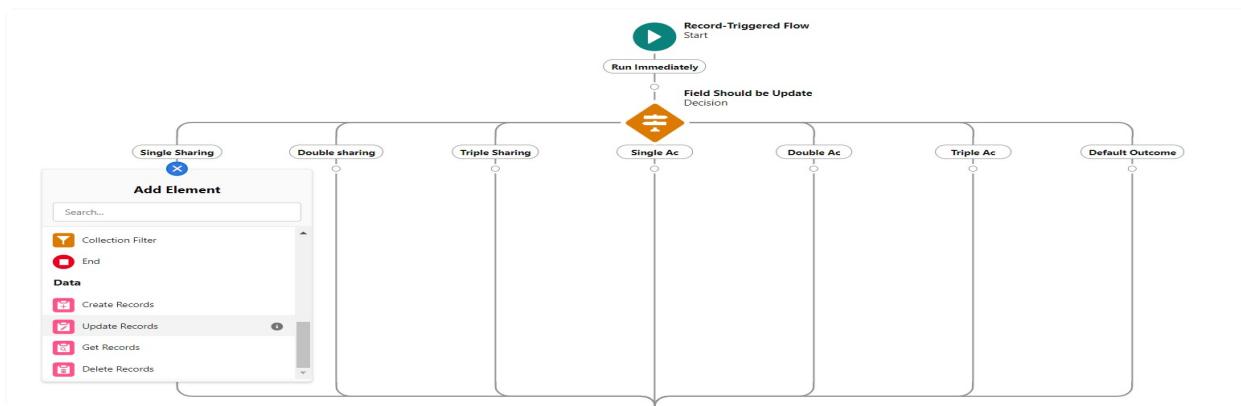
13. Enter the Outcome Details Label: Triple Ac, Outcome API name: Gets

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.



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	
<div style="border: 1px solid #ccc; padding: 5px; height: 60px; 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	28000

[Cancel](#) [Done](#)

16. Enter the update records details

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

- Click on Done.

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; padding: 5px; height: 40px;"></div>	
* How to Find Records to Update and Set Their Values <input checked="" type="radio"/> Use the room booking record that triggered the flow <input type="radio"/> Update records related to the room booking record that triggered the flow <input type="radio"/> Use the IDs and all field values from a record or record collection <input type="radio"/> 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.</i>	
Set Filter Conditions Condition Requirements to Update Record <input type="button" value="None—Always Update Record"/>	
Set Field Values for the Room Booking Record Field: <input type="text" value="Amount__c"/> Value: <input type="text" value="20000"/> <input type="button" value="Add Field"/>	
<input type="button" value="Cancel"/> <input type="button" value="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							
<p>* How to Find Records to Update and Set Their Values</p> <input checked="" type="radio"/> Use the room booking record that triggered the flow <input type="radio"/> Update records related to the room booking record that triggered the flow <input type="radio"/> Use the IDs and all field values from a record or record collection <input type="radio"/> Specify conditions to identify records, and set fields individually							
<p>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.</p>							
<p>Set Filter Conditions</p> <p>Condition Requirements to Update Record</p> <p>None—Always Update Record</p>							
<p>Set Field Values for the Room Booking Record</p> <table border="1"> <tr> <td>Field</td> <td>Value</td> </tr> <tr> <td>Amount_c</td> <td>34000</td> </tr> <tr> <td colspan="2"> + Add Field </td> </tr> </table>		Field	Value	Amount_c	34000	+ Add Field	
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.

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: **API Name:**

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:

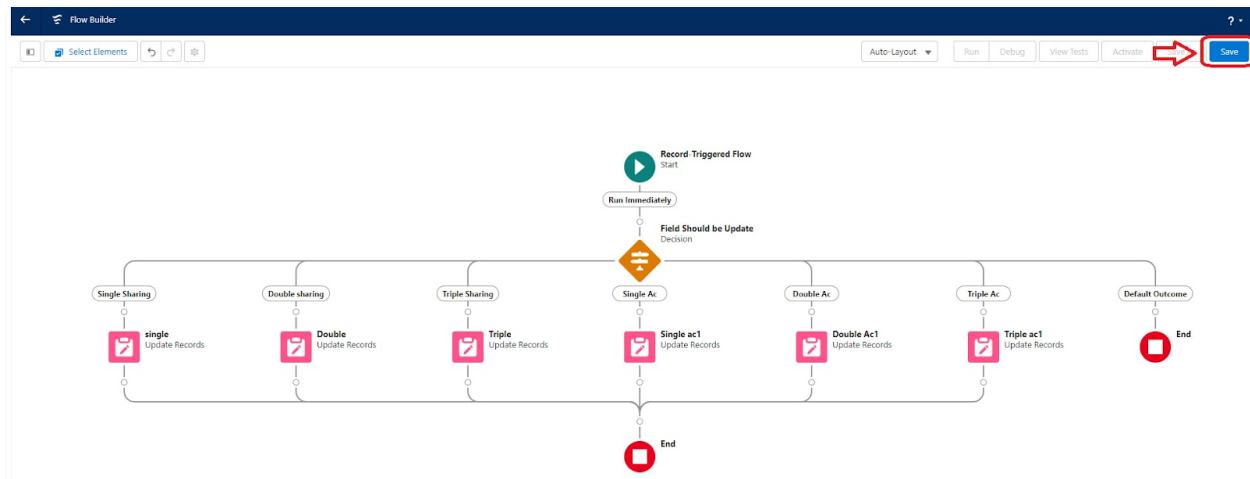
Condition Requirements to Update Record:

Set Field Values for the Room Booking Record:

Field	Value
Amount_c	26000

Buttons: Cancel, Done

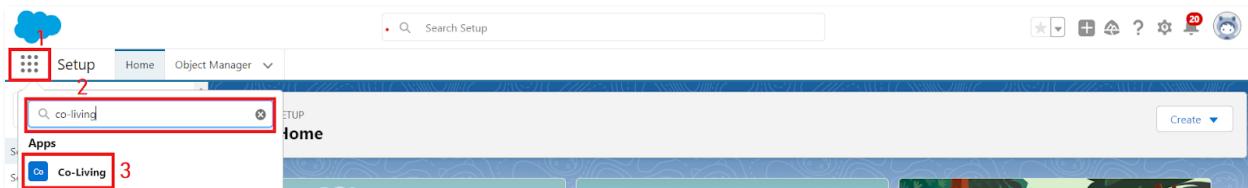
21. The Flow will Form like This and Click on save.



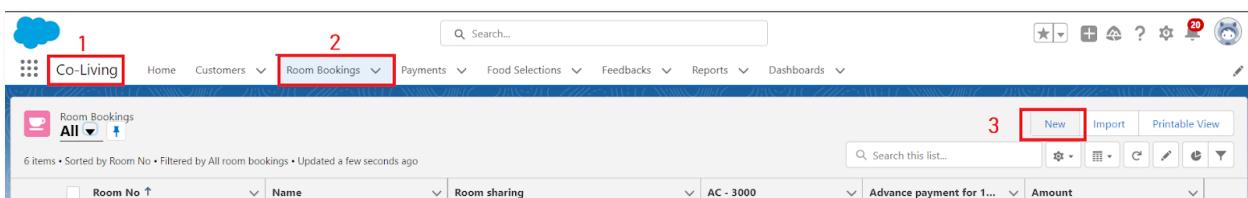
22. Enter the Flow Label: Update Amount Field, Flow API Name: Gets Automatically Generated and Click on Save.

Activity2 - Test the Flow

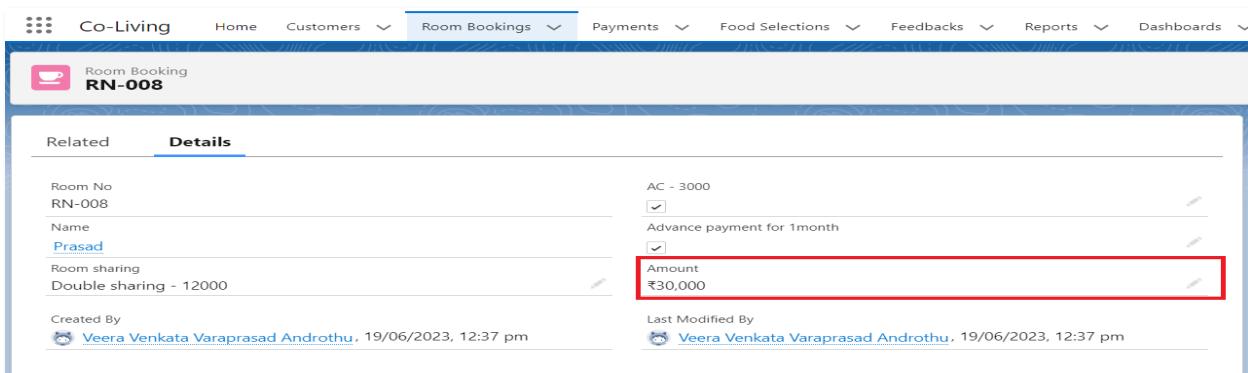
1. Go to App Launcher and search for Co-living and select the app



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



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



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

Thank you