

Project Title: A CRM Application to Manage the Booking of Co-Living

By

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Project Abstract

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

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

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

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INTRODUCTION

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

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

TASK1: Create and activate salesforce account

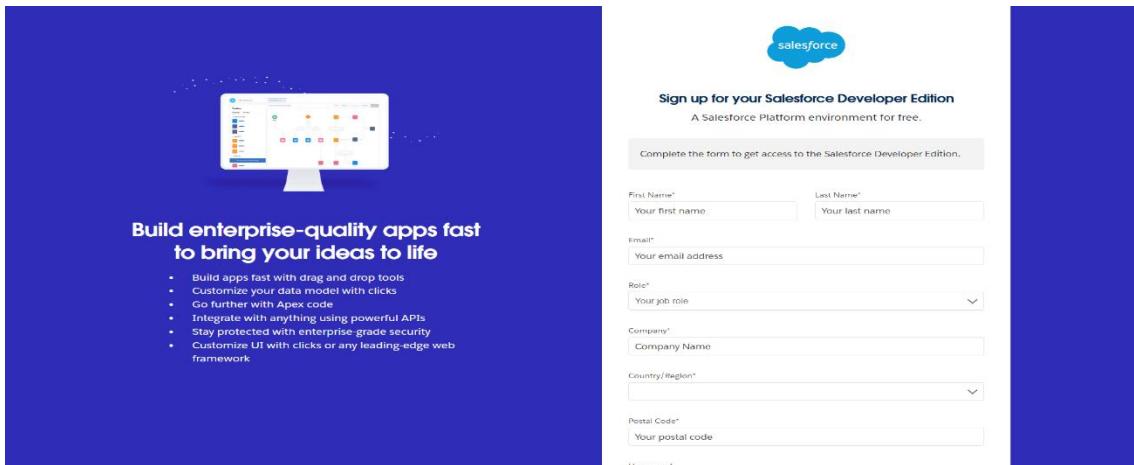
1.1 Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
 1. First name & Last name
 2. Email
 3. Role : Developer
 4. Company : College Name
 5. County : India
 6. Postal Code : pin code

Username : should be a combination of your name and company
This need not be an actual email id; you can give anything in the format: username@organization.com

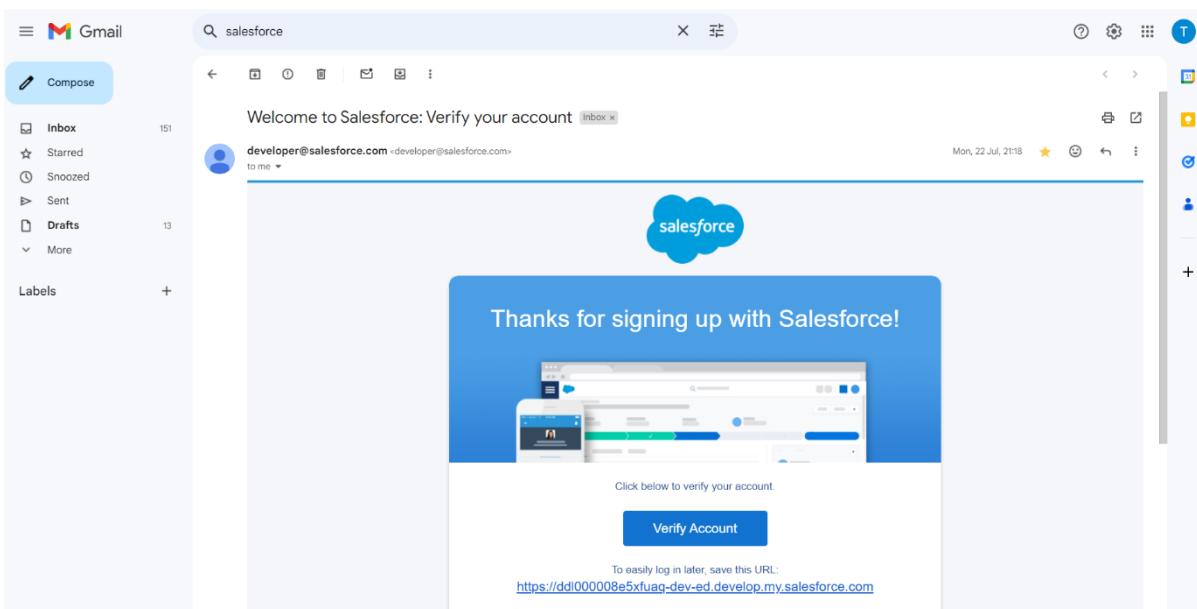
Click on sign me up after filling these.



1.2 Account Activation

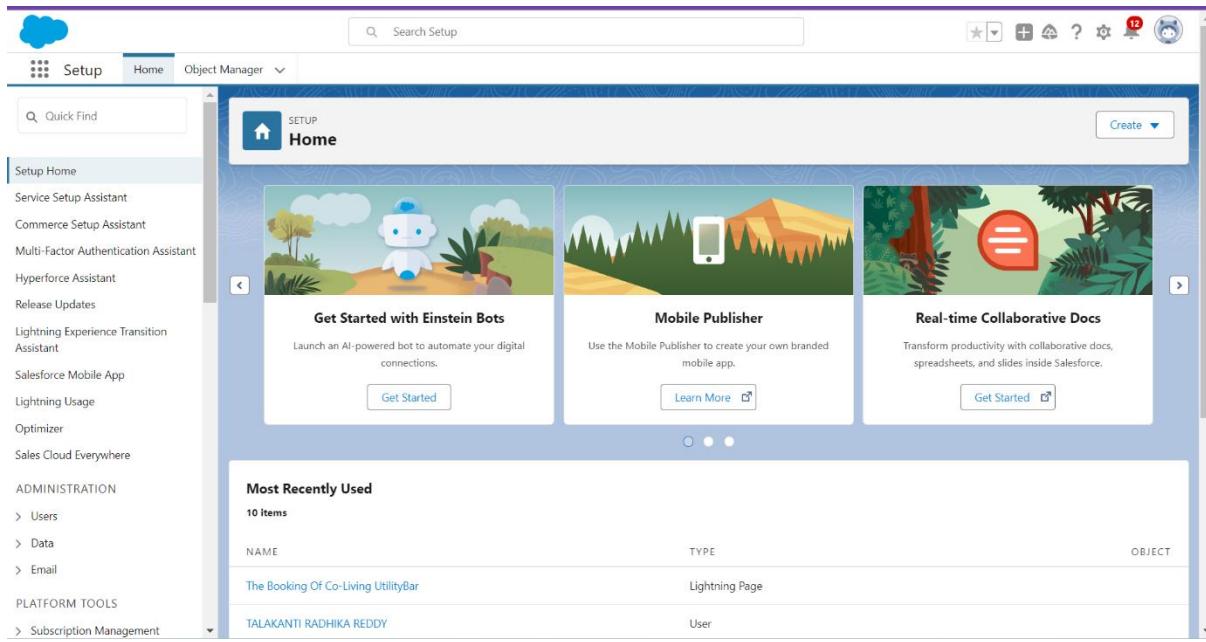
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.

2. Click on Verify Account



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

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



TASK2: Create Objects

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

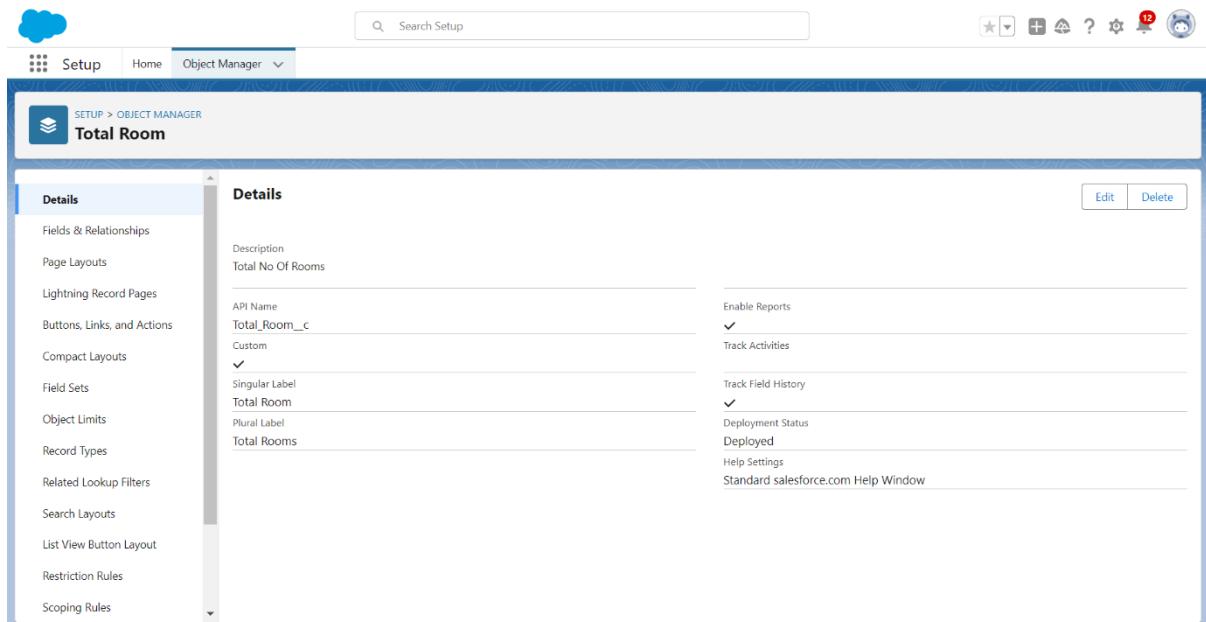
Salesforce objects are of two types:

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

2.1 Create a custom object for Total Rooms

To create a custom object, follow these steps:

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



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

2.2 Create a custom object for Customer

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Customer1".
4. Fill in the plural label as "Customers".
5. Record name: "Customer Name"

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various icons for search, refresh, and help. The main area displays the details for the 'Customer1' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The right panel shows the 'Details' section for 'Customer1'. It includes fields for Description ('Customer Name'), API Name ('Customer1__c'), Singular Label ('Customer1'), and Plural Label ('Customers'). Under the 'Edit' tab, there are checkboxes for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), and 'Deployment Status' (set to 'Deployed'). The 'Help Settings' field points to 'Standard salesforce.com Help Window'. At the bottom right are 'Edit' and 'Delete' buttons.

6. Select the data type as "Text".
7. Follow steps 7 to 11 as mentioned for previous object.

2.3 Create a custom object for Room Booking

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Room Booking ".
4. Fill in the plural label as " Room Bookings ".
5. Record name: "Room No "
6. Select the data type as "Auto number ".
7. Under Display format enter RN-{000}
8. Enter starting Number as 1

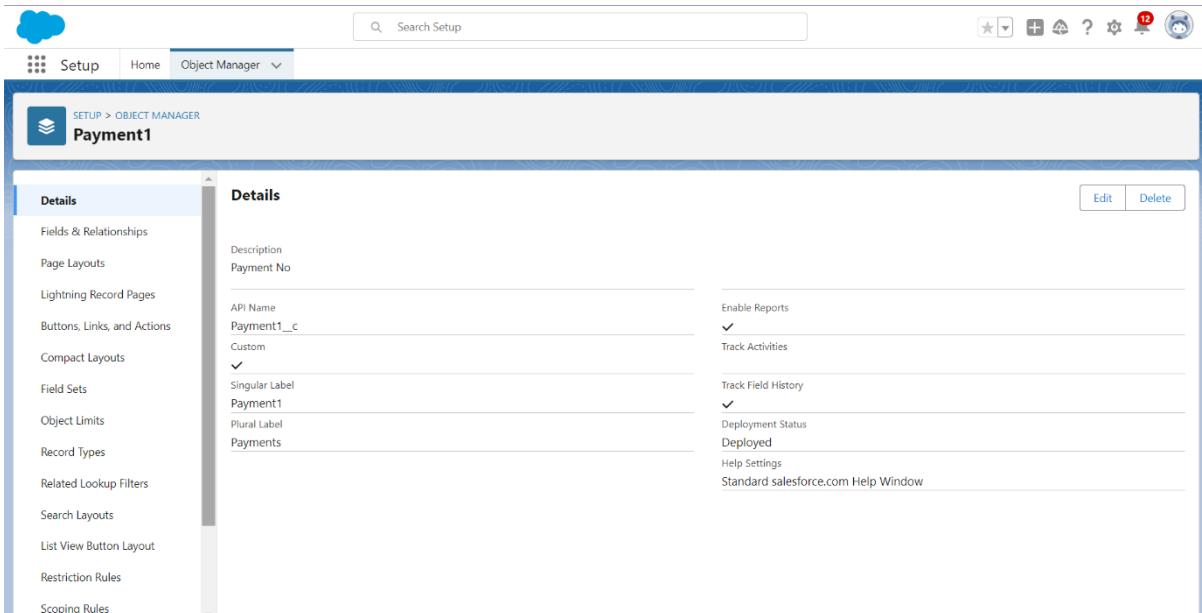
The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various icons for search, refresh, and help. The main area displays the details for the 'Room Booking' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The right panel shows the 'Details' section for 'Room Booking'. It includes fields for Description ('Room Booking'), API Name ('Room_Booking__c'), Singular Label ('Room Booking'), and Plural Label ('Room Bookings'). Under the 'Edit' tab, there are checkboxes for 'Enable Reports' (checked), 'Track Activities', 'Track Field History' (checked), and 'Deployment Status' (set to 'Deployed'). The 'Help Settings' field points to 'Standard salesforce.com Help Window'. At the bottom right are 'Edit' and 'Delete' buttons.

9. Follow remaining steps as mentioned previously.

2.4 Create a custom object for Payment

To create a custom object, follow these steps:

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



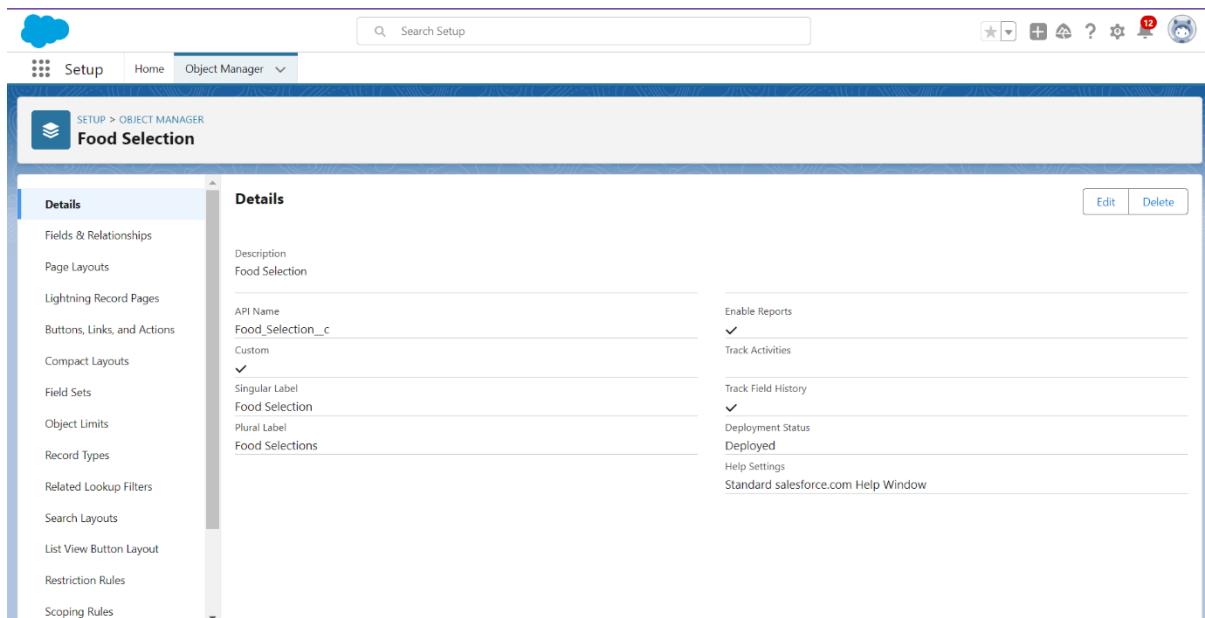
3. Fill in the label as " Payment1".
4. Fill in the plural label as " Payments ".
5. Record name: "Payment No "
6. Select the data type as "Auto number ".
7. Under Display format enter PNO-{000}
8. Enter starting Number as 1
9. Follow remaining steps as mentioned previously.

2.5 Create a custom object for Food Selection

To create a custom object, follow these steps:

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

7. Under Display format enter FS No-{000}



8. Enter starting Number as 1

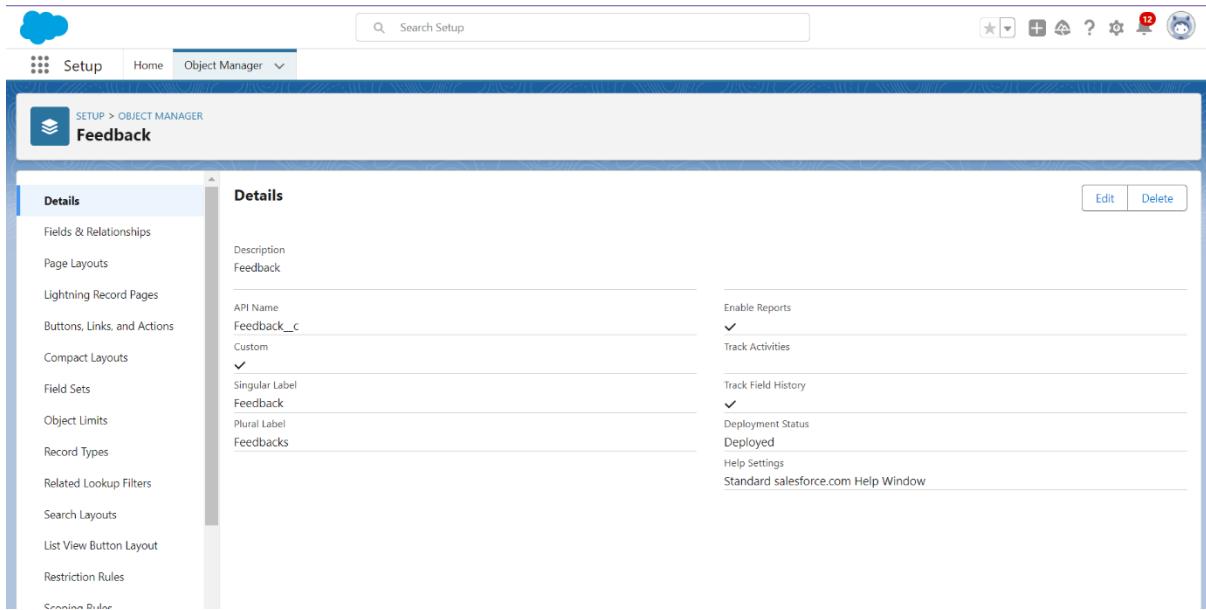
9. Follow remaining steps as mentioned previously.

2.6 Create a custom object for Feedback

To create a custom object, follow these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Feedback".
4. Fill in the plural label as "Feedbacks".
5. Record name: "Feedback No"
6. Select the data type as "Auto number".
7. Under Display format enter Fd No-{0000}

8. Enter starting Number as 1



9. Follow remaining steps as mentioned previously.

TASK3: Creating Tabs

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

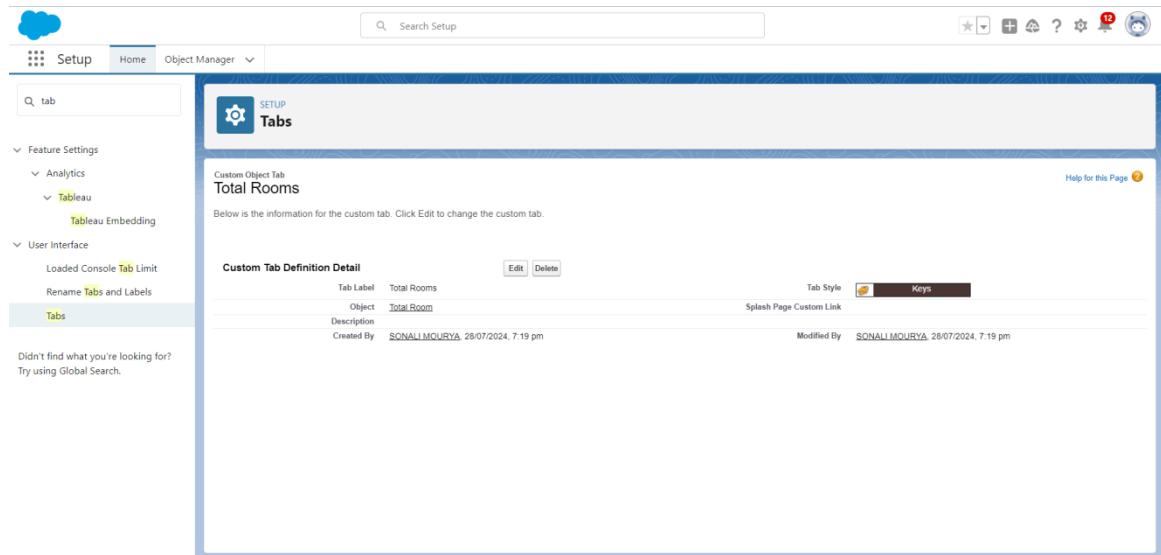
Types of Tabs:

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

3.1 Creating a Tab for Total Rooms

To create a Tab:(Total Rooms):

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

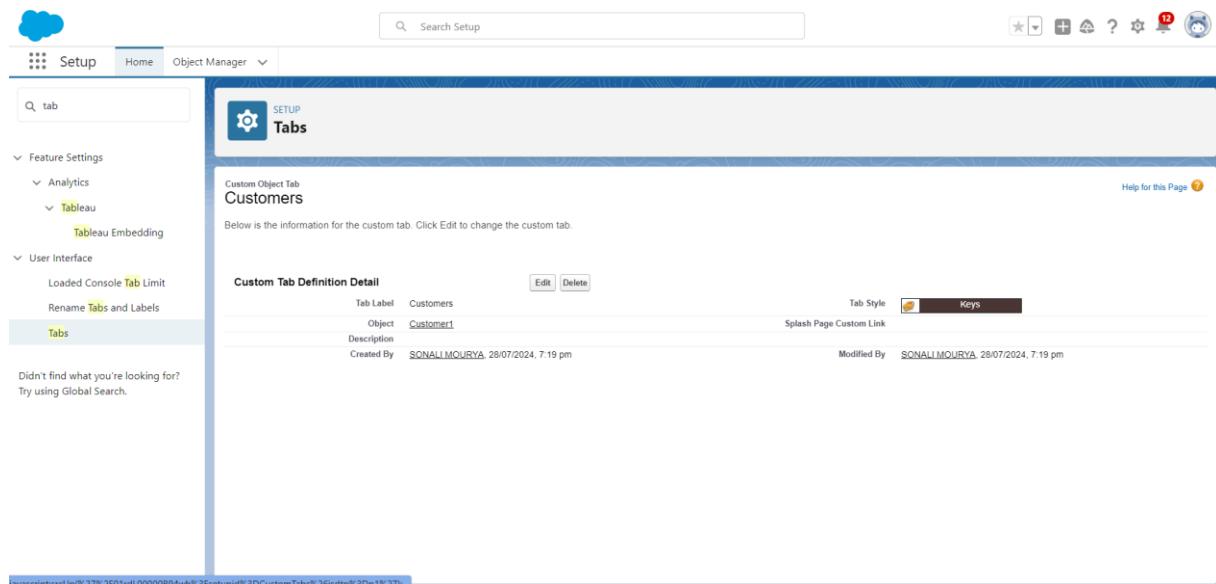


4. Next (Add to Custom App) keep it as default & save.

3.2 Create a Tab for Customers

To create a Tab:(Customers)

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



3.3 To create a Tab for Room Bookings

To create a Tab:(Room Bookings)

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

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open with the 'Tabs' section selected under 'User Interface'. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'Custom Object Tab' and 'Room Bookings'. It displays the 'Custom Tab Definition Detail' for the 'Room Bookings' tab. The tab label is 'Room Bookings', the object is 'Room Booking', and the tab style is 'Keys'. The tab was created by 'SONALI MOURYA' on '28/07/2024, 7:21 pm' and modified by the same user on the same date. There are 'Edit' and 'Delete' buttons at the top right of the detail section.

3.4 Create a Tabs For Remaining Objects

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

The screenshot shows the Salesforce Setup interface. The 'Tabs' section is selected in the navigation sidebar. The main content area is titled 'Custom Tabs'. It provides information about creating new custom tabs to extend Salesforce functionality or build new application functionality. Below this, there is a table titled 'Custom Object Tabs' listing several tabs:

Action	Label	Tab Style	Description
Edit Del	Customers	Keys	
Edit Del	Feedbacks	Keys	
Edit Del	Food Selections	Keys	
Edit Del	Payments	Keys	
Edit Del	Room Bookings	Keys	
Edit Del	Total Rooms	Keys	

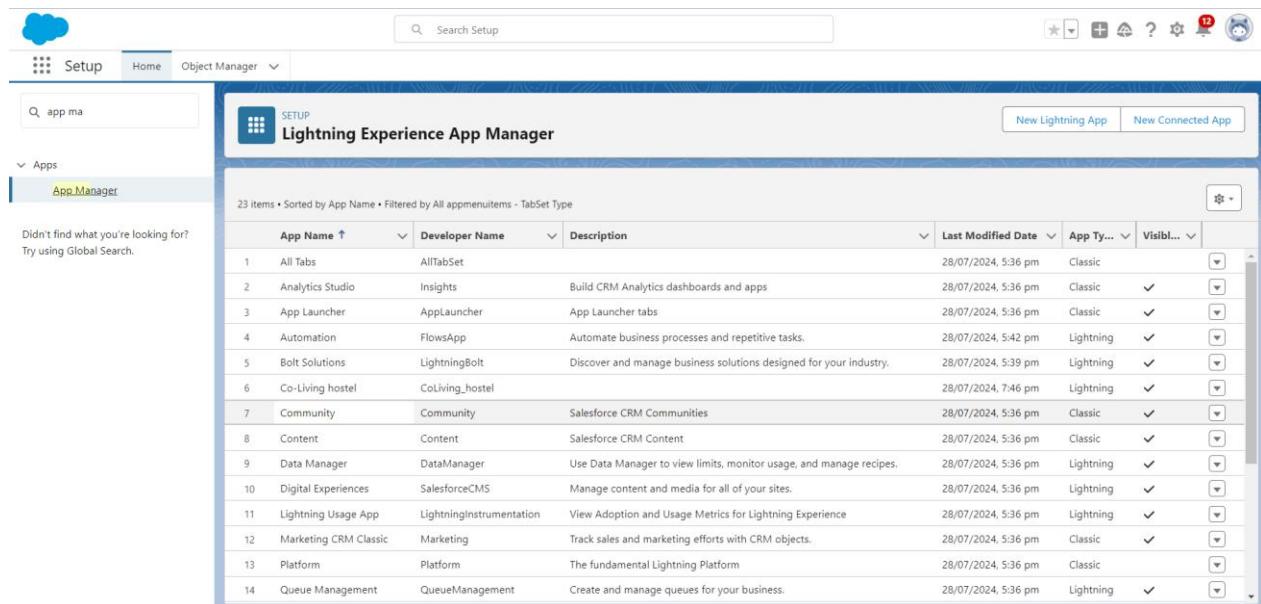
TASK4: The Lightning App

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

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

4.1 Create a Lightning App

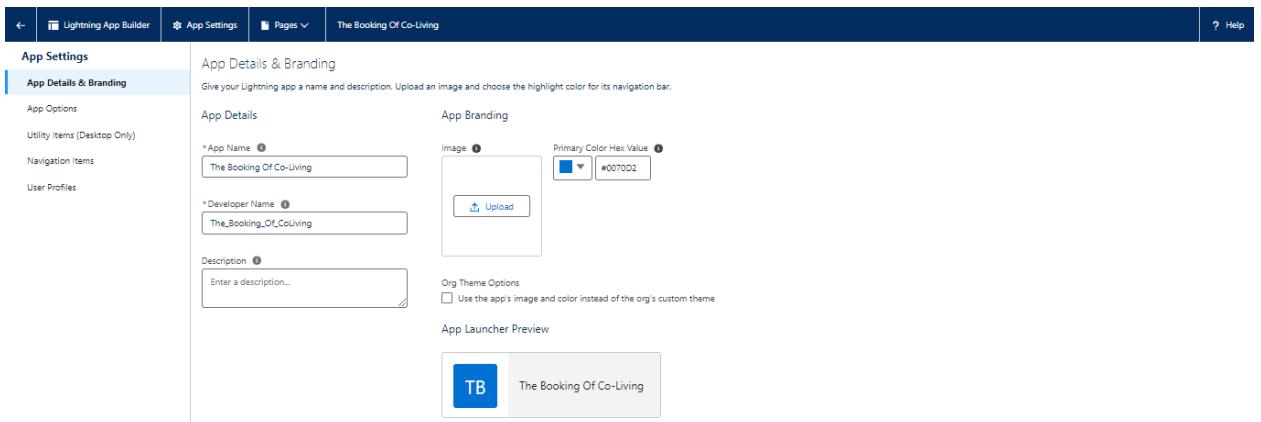
1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.



The screenshot shows the "Lightning Experience App Manager" page. At the top, there's a search bar and various navigation icons. Below the header, a sidebar on the left lists "App Manager" and "Global Search". The main area displays a table titled "Lightning Experience App Manager" with 23 items. The columns are: App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. The table lists various built-in apps like All Tabs, Analytics Studio, App Launcher, etc. A "New Lightning App" button is located at the top right of the main content area.

App Name	Developer Name	Description	Last Modified Date	App Type	Visibility
1 All Tabs	AllTabSet		28/07/2024, 5:36 pm	Classic	Visible
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	28/07/2024, 5:36 pm	Classic	Visible
3 App Launcher	AppLauncher	App Launcher tabs	28/07/2024, 5:36 pm	Classic	Visible
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	28/07/2024, 5:42 pm	Lightning	Visible
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	28/07/2024, 5:39 pm	Lightning	Visible
6 Co-Living hostel	CoLiving_hostel		28/07/2024, 7:46 pm	Lightning	Visible
7 Community	Community	Salesforce CRM Communities	28/07/2024, 5:36 pm	Classic	Visible
8 Content	Content	Salesforce CRM Content	28/07/2024, 5:36 pm	Classic	Visible
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	28/07/2024, 5:36 pm	Lightning	Visible
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/07/2024, 5:36 pm	Lightning	Visible
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	28/07/2024, 5:36 pm	Lightning	Visible
12 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	28/07/2024, 5:36 pm	Classic	Visible
13 Platform	Platform	The fundamental Lightning Platform	28/07/2024, 5:36 pm	Classic	Visible
14 Queue Management	QueueManagement	Create and manage queues for your business.	28/07/2024, 5:36 pm	Lightning	Visible

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 "App Details & Branding" section of the Lightning App Builder. It includes fields for "App Name" (The Booking Of Co-Living), "Developer Name" (The_Booking_Of_CoLiving), and "Description" (Enter a description...). There are also sections for "Image" (Upload button) and "Primary Color Hex Value" (#0070D2). A checkbox for "Org Theme Options" is present. Below this, there's an "App Launcher Preview" section showing a blue button labeled "TB" and the text "The Booking Of Co-Living".

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

4. To Add User Profiles:

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

TASK5: Fields & Relationships

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

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

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

1. Created By

2. Owner
3. Last Modified
4. Field Made During Object Creation

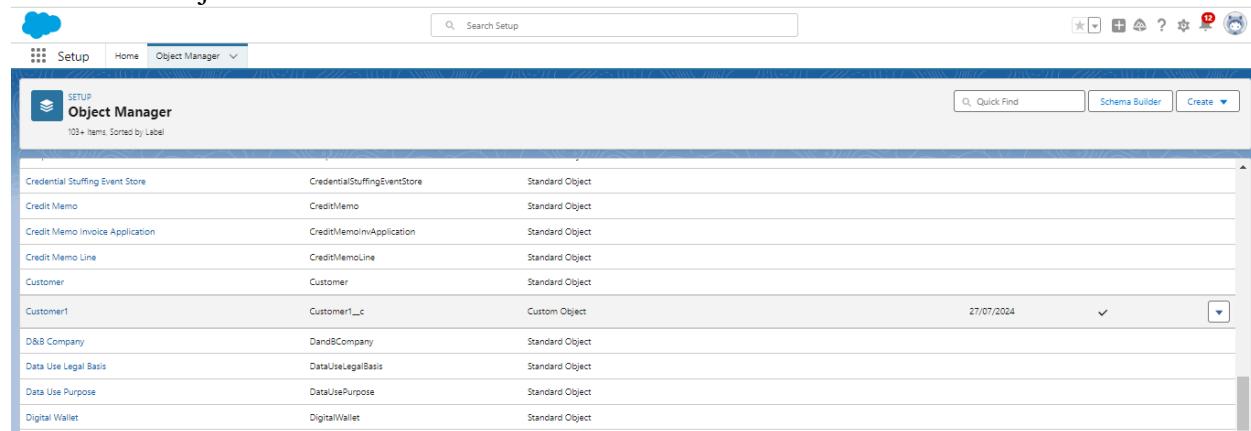
Custom Fields:

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

5.1 Creation of fields for the customer1 object

5.1.1 To create fields in an object:

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



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'SETUP' and 'Object Manager'. Below it, a search bar says 'Search Setup'. On the right, there are icons for 'Quick Find', 'Schema Builder', and 'Create'. The main area is titled 'Object Manager' and shows a list of objects. One object, 'Customer1', is highlighted. The list includes:

Object Name	Label	Type
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object
Credit Memo	CreditMemo	Standard Object
Credit Memo Invoice Application	CreditMemoInvoiceApplication	Standard Object
Credit Memo Line	CreditMemoLine	Standard Object
Customer	Customer	Standard Object
Customer1	Customer1_c	Custom Object
D&D Company	DandDCompany	Standard Object
Data Use Legal Basis	DataUseLegalBasis	Standard Object
Data Use Purpose	DataUsePurpose	Standard Object
Digital Wallet	DigitalWallet	Standard Object

2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Phone”
4. Click on next
5. Fill the Above as following:
 1. Field Label: Phone no
 2. Field Name : gets auto generated
 3. Click on Next > Next > Save and new.

5.1.2 To create another fields in an object:

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

5.1.3 To create another fields in an object:

1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select Data type as a “Text Area” and Click on Next

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

5.1.4 To create another fields in an object:

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Status	Current_Status__c	Picklist		
Customer Name	Name	Text(80)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

5.2 Creation of fields for the Room Booking object

5.2.1 To create fields in an object:

- 1.Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
- 2.Now click on “Fields & Relationships” > New
- Select Data Type as a “Picklist”
- Click on Next
- Fill the Above as following:
 - Field Label: Room Sharing
 - Value - Select enter values with each value separated by a new line
 1. Single sharing
 2. Double sharing
 3. Triple sharing
 - Select required
 - Click on Next > Next > Save and new.

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

To create fields & relationship to an object:

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

5.2.3 To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: AC-3000
 - Field Name :It’s gets auto generated
 - Click on Next > Next > Save and new

5.2.4 To create fields in an object:

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

5.2.5 To create fields in an object:

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

5.2.6 To Create a Fields & Relationship to an Object

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

2. Now click on “Fields & Relationships” ? New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Rooms” object and click on Next
 - Fill the Above as following:
 - Change the Field Label: Total No Of Rooms
 - Field Name :It’s gets auto generated
 - Click on Next > Next > Save and new.

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

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

5.2.8 To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Rooms Booking) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Formula” and Click on Next
4. Fill the Above as following:
 - Field Label: Rooms Available
 - Field Name : It’s gets auto generated
 - Select the Formula Return Type as “Number”
 - Select the Decimal places as “0” and Click on Next
 - Click on the Advanced Formula and Enter the value in formula box “ 30 - ” and Click on insert field than you will find a pop window under the Room Booking select the Total No Of Rooms in the second Column and select the Room Booked in the third column and click on insert “ 30 - Total_No_Of_Rooms__r.Rooms_Booked__c ” and Check Syntax
 - Click on Next > Next > Save and new.

5.2.9 To create fields in an object:

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

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

5.2.10 To create fields in an object:

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

Fields & Relationships 12 Items, Sorted by Field Label					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	AC-3000	AC_3000__c	Checkbox		
Lightning Record Pages	Advance Payment for 1 Month	Advance_Payment_for_1_Month__c	Checkbox		
Buttons, Links, and Actions	Amount	Amount__c	Currency(18, 0)		
Compact Layouts	Check In	Check_In__c	Checkbox		
Field Sets	Check Out	Check_Out__c	Checkbox		
Object Limits	Created By	CreatedById	Lookup(User)		
Record Types	Last Modified By	LastModifiedById	Lookup(User)		
Related Lookup Filters	Name	Name__c	Master-Detail(Customer1)		
Search Layouts	Room No	Name	Auto Number		
List View Button Layout	Room Sharing	Room_Sharing__c	Picklist		
Restriction Rules	Rooms Available	Rooms_Available__c	Formula (Number)		
Scoping Rules	Total No Of Rooms	Total_No_Of_Rooms__c	Master-Detail(Total Room)		
Triggers					
Flow Triggers					
Validation Rules					

5.3 Creation of Fields & Relationship for Payment1 Object

5.3.1 To create fields & relationship to an object:

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

5.3.2 To create another fields & relationship to an object:

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

- Click on Next
- Click on the Related to drop down and Select the Room Booking object and click on Next
- Fill the Above as following:
- Change the Field Label: Room Booking
- Field Name: It's gets auto generated
- Click on Next > Next > Save and new.

5.3.3 Creation of other fields for the Payment1 object

To create fields in an object:

- Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.
- Now click on “Fields & Relationships” > New
- Select Data Type as a “Picklist”
- Fill the Above as following:
 - Field Label: Payment Mode
 - Value - Select enter values with each value separated by a new line
 1. Cash
 2. Check
 3. Credit card
 4. Debit card
 5. UPI
 6. Phonepe
 7. Gpay
 8. Paytm
 - Select required
 - Click on Next > Next > Save and new.

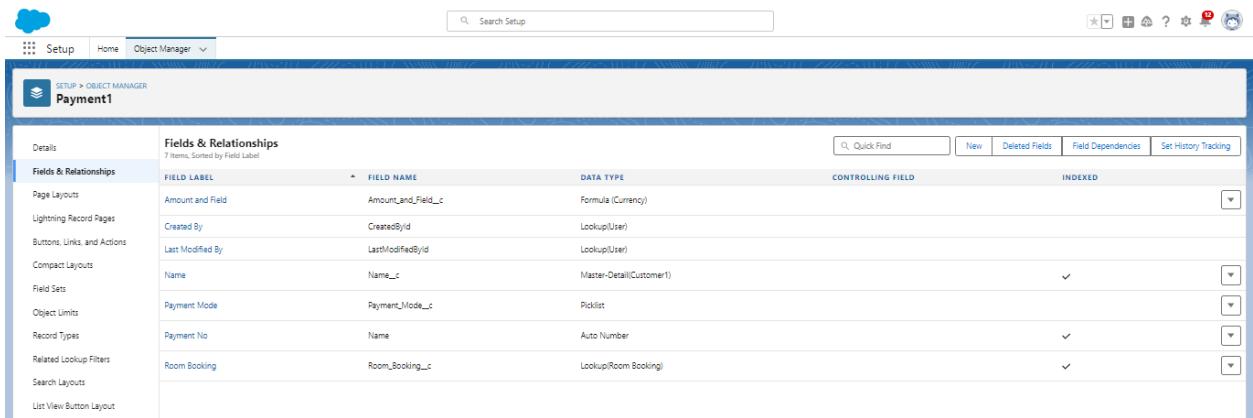
Cross Object Formula Field:

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

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

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

- Now click on “Fields & Relationships” > New
- Select Data Type as a “Formula”
- Click on Next
- Enter the Field label: Amount and Field name: gets auto generated and click on Next
- In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “Room_Booking__r.Amount__c”.
- Click on the Check syntax: No syntax errors in merge fields
- Click on Next > Next > Save and new.



5.4. Creation of fields for the Food Selection object

5.4.1 To create fields & relationship to an object:

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

Picklist value sets:

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

Create a picklist value set:

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

5.4.2 Create a picklist Field for Food selection object

To create fields in an object:

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

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

5.4.3 Create another picklist Field for Food selection object

To create fields in an object :

1. Go to setup > click on Object Manager > type object name (Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Select Breakfast
 - Under Value - Enter values, with each value separated by a new line
 1. Idli
 2. Bonda
 3. Dosa
 4. Upma
 5. Vada
 6. Puri
 7. Chapati
 - Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

Field Dependency:

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

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

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

5.4.4 To create fields in an object:

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

- Select required
- Click on Next > Next > Save and new.

5.4.5 To create fields in an object:

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

Fields & Relationships					
		FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
FIELD LABEL					
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	
Select Lunch		Select_Lunch_c	Picklist	Lunch	

To create a Field dependency for Lunch and Select Lunch.

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

5.4.6 To create fields in an object:

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

5.4.7 To create fields in an object:

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

To create a Field dependencies for Dinner and Select Dinner.

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

The screenshot shows the Salesforce Setup interface with the 'Edit Field Dependency' page open. The left sidebar lists various setup categories like Service Setup Assistant, Multi-Factor Authentication Assistant, etc. The main page title is 'Edit Field Dependency'. It shows a grid of food items categorized by meal type (Breakfast, Main, Dessert). A legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'. Instructions at the top advise on how to use the grid to manage field dependencies.

5.5. Creation of fields for the Feedback object

5.5.1 create fields & relationship to an object:

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

5.5.2 To create other fields in an Same object:

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

5.5.3 To create a Another Fields in an Same Object

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

3. Select Data Type as a “Picklist”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Internet
 - Field Name: It’s gets auto generated
 - Under Values select Enter values, with each value separated by a new line
 1. Good
 2. Satisfaction
 3. Bad
 - Click on Next > Next > Save and new.

5.5.4 To create a Another Fields in an Same Object

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

5.5.5 To create a Another Fields in an Same Object

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

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

5.6. Creation of fields for the Total Rooms object

5.6.1 To create fields in an object:

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		
Rooms Available	Rooms_Available__c	Formula (Number)		
Rooms Booked	Rooms_Booked__c	Roll-Up Summary (COUNT Room Booking)		
Total No Of Rooms	Name	Text(80)		

TASK6: Validation rule

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

6.1 Create a validation rule to a Room Booking Object

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

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

Setup > OBJECT MANAGER

Room Booking

Room Booking Validation Rule

Validation Rule Detail

Rule Name	checkbox_field	Active
Error Condition Formula	Advance_Payment_for_1_Month__c = false	✓
Error Message	Checkbox should be checked	Error Location
Description		Advance Payment for 1 Month
Created By	SONALI MOURYA, 28/07/2024, 9:24 pm	Modified By
		SONALI MOURYA, 28/07/2024, 9:24 pm

Left sidebar (Details)

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

6.2 Create a Another validation rule to a Room Booking Object

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

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

Setup > OBJECT MANAGER

Room Booking

Room Booking Validation Rule

Validation Rule Detail

Rule Name	check_in_rule	Active
Error Condition Formula	Check_in__c = false	✓
Error Message	Check box should be checked	Error Location
Description		Check in
Created By	SONALI MOURYA, 28/07/2024, 9:27 pm	Modified By
		SONALI MOURYA, 28/07/2024, 9:27 pm

Left sidebar (Details)

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

TASK7: Creating Profiles

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

Types of profiles in salesforce

1. Standard profiles:

By default, salesforce provides below standard profiles.

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

2. Custom Profiles:

Custom ones defined by us.

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

7.1 Custom user Profile

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. A profile named 'Custom User' is selected. The page displays profile details like Name, User License, Description, and Created By. It also shows page layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. Each layout has specific assignments listed next to it.

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

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

7.2 Custom platform user1

To create a new profile:

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

Profile
Custom platform User1

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

Object	Layout	Assignment
Global	Global Layout [View Assignment]	Lead Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone Object Milestone Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout	Operating Hours Operating Hours Layout

Custom Profile

Page Layouts

Custom Object Permissions

Object	Basic Access	Data Administration	Basic Access	Data Administration									
Customers	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □	Payments	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □
Feedbacks	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □	Room Bookings	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □
Food Selections	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □	Total Rooms	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □

Profile
Custom platform User1

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

Object	Layout	Assignment
Global	Global Layout [View Assignment]	Lead Lead Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Location Location Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Group Location Group Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Assignment Location Group Assignment Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Object Milestone Object Milestone Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout	Operating Hours Operating Hours Layout

Custom Object Permissions

Object	Basic Access	Data Administration	Basic Access	Data Administration									
Customers	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □	Payments	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □
Feedbacks	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □	Room Bookings	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □
Food Selections	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □	Total Rooms	Read ✓	Create □	Edit □	Delete □	View All □	Modify All □

7.3 Custom platform user2

To create a new profile:

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

TASK8: Creating Roles

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

8.1 Marketing Role

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

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with a search bar and sections for Users (Roles is selected), Feature Settings, Sales, Service, and Case Teams. The main area is titled "Creating the Role Hierarchy" and shows a tree view of roles under "Your Organization's Role Hierarchy". The tree includes the following structure:

- Malla Reddy University
 - CEO
 - CFO
 - COO
 - Marketing
 - Receptionist
 - SVP, Customer Service & Support
 - Customer Support, International
 - Customer Support, North America
 - Installation & Repair Services

8.2 Receptionist Role

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

The screenshot shows the "Role Edit" screen for the "Receptionist" role. The "Label" field contains "Receptionist", the "Role Name" field contains "Receptionist", and the "This role reports to" dropdown is set to "CEO". There is also a "Role Name as displayed on reports" field which is empty. At the bottom, there are "Save", "Save & New", and "Cancel" buttons, with "Save" being the active button.

TASK9: Users

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

9.1 Create User

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

The screenshot shows the Salesforce Setup interface under the 'Users' tab. The user 'sandeep gujja' is selected. The 'User Detail' section displays the following information:

Name	sandeep gujja	Role	CEO
Alias	sgujj	User License	Salesforce
Email	sonalmourya0904@gmail.com	Profile	Custom User
Username	sonalmourya2002@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User172183533118922679	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input checked="" type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
Ano Registration: One-Time Password		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>

9.2 Create Another User

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

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

3. save

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. A user named 'Abhilash garapati' is being edited. The profile includes the following details:

- Personal Information:** Alias: agara, Email: sonalmourya0904@gmail.com (Verify), Username: sonalmourya04@gmail.com, Nickname: User17221837142849247553, Title: , Company: , Department: , Division: , Address: , Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English, Delegated Approver: Manager.
- Profile:** User License: Salesforce Platform Profile: Custom Platform User1, Active: checked, Marketing User: checked, Offline User: unchecked, Knowledge User: unchecked, Flow User: unchecked, Service Cloud User: unchecked, Site.com Contributor User: unchecked, Site.com Publisher User: unchecked, WDC User: unchecked, Mobile Push Registrations: View, Data.com User Type: , Accessibility Mode (Classic Only): unchecked, Debug Mode: unchecked, High-Contrast Palette on Charts: unchecked.
- Other:** Receive Approval Request Emails: Only if I am an approver, Federation ID: , Load Lightning Pages While Scrolling: checked.

9.3 Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Ganesh
 - Last Name : gelli
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name: Give a Nickname
 - Role : Receptionist
 - User licence: Salesforce Platform
 - Profiles : Custom Platform user2

3. Save

TASK10: User Adoption

10.1 Create a Record (Customers)

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

10.2 View a Record (Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Co-Living hostel & click on it.

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

The screenshot shows the Salesforce Customer Record Detail View for a contact named 'sandeep'. The page has a header with navigation links like Total Rooms, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, Dashboards, and another Customers link. Below the header is a search bar and a toolbar with icons for New Contact, Edit, and New Opportunity. The main content area is titled 'Customer sandeep' and contains tabs for 'Related' and 'Details'. The 'Details' tab is selected, showing fields for Customer Name (sandeep), Phone no (3456798734), Email (sandeep123@gmail.com), Permanent Address (delhi), Current Status (Employee), and Created By (SONALI MOURYA). The 'Owner' field also lists SONALI MOURYA. At the bottom, it shows Last Modified By (SONALI MOURYA) and the date (29/07/2024, 10:32 am).

10.3 Delete a Record (Customers)

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

The screenshot shows the Salesforce Customer List View under the 'Recently Viewed' section. The header includes a cloud icon, the organization name 'Co-Living hostel', and standard navigation links. The main area displays a list of recently viewed customers with their names: sandeep, abhi, john, and abhilash. To the right of the list is a toolbar with options for New, Import, Change Owner, and Assign Label. A context menu is open over the fourth record, listing Edit, Delete, Change Owner, and Edit Labels.

TASK11: Reports

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

Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

11.1 Create Report

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

The screenshot shows the Salesforce Object Manager interface for the 'Room Booking' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled 'Room Booking Validation Rule' and displays a single record with the following details:

Validation Rule Detail	
Rule Name	check_in_rule
Error Condition Formula	Check_in__c = false
Error Message	Check box should be checked
Description	
Created By	SONALI MOURYA 28/07/2024, 9:27 pm
Active	<input checked="" type="checkbox"/>
Error Location	Check in
Modified By	SONALI MOURYA 28/07/2024, 9:27 pm

11.2 Create Another Report

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

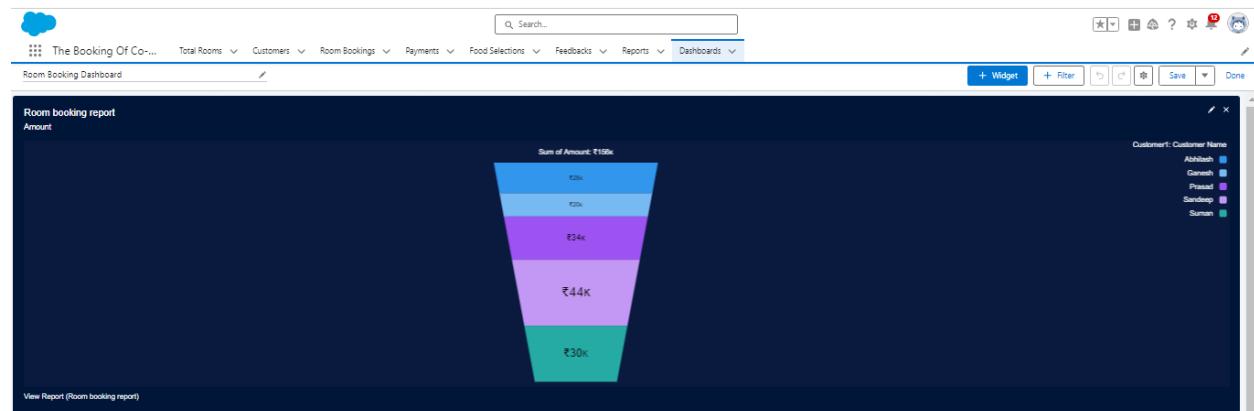
Customer Name	Room Booking ID	Total No Of Rooms	Phone no	Email	Permanent Address	Current Status	Room Sharing
abhi (1)	RN-004	12	a02dL000003VuPB	8328540654	abhi234@gmail.com	up	Employee
Subtotal							
abhilash (1)	RN-002	12	a02dL000003VuCH	8328540943	abhilash123@gmail.com	mumbai	Employee
Subtotal							
john (1)	RN-003	12	a02dL000003VuJ	3456798734	joh123@gmail.com	hyderabad	Student
Subtotal							
sandeep (2)	RN-005	12	a02dL000003VmB6	3456798734	sandeep123@gmail.com	delhi	Employee
	RN-001	12	a02dL000003VuAf	3456798734	sandeep123@gmail.com	delhi	Employee
Subtotal							
Total (5)							

Taks12: Dashboards

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

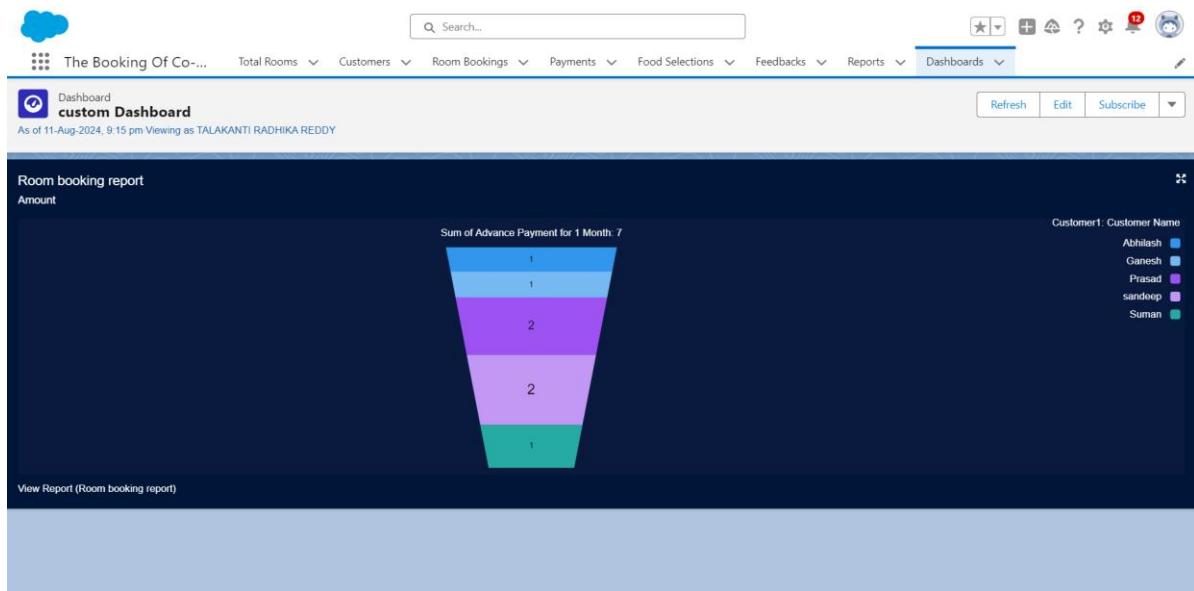
12.1 Create Dashboard

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



12.2 Create Another Dashboard

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



Task – 13: Flows

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

13.1. Create a Flow

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

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

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

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

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

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

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

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

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

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

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

15. Enter the update records details

- Label: Single.
- API name: Gets automatically Generated.

- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 28000.
- Click on Done.

16. Enter the update records details

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

17. Enter the update records details

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

18. Enter the update records details

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

19. Enter the update records details

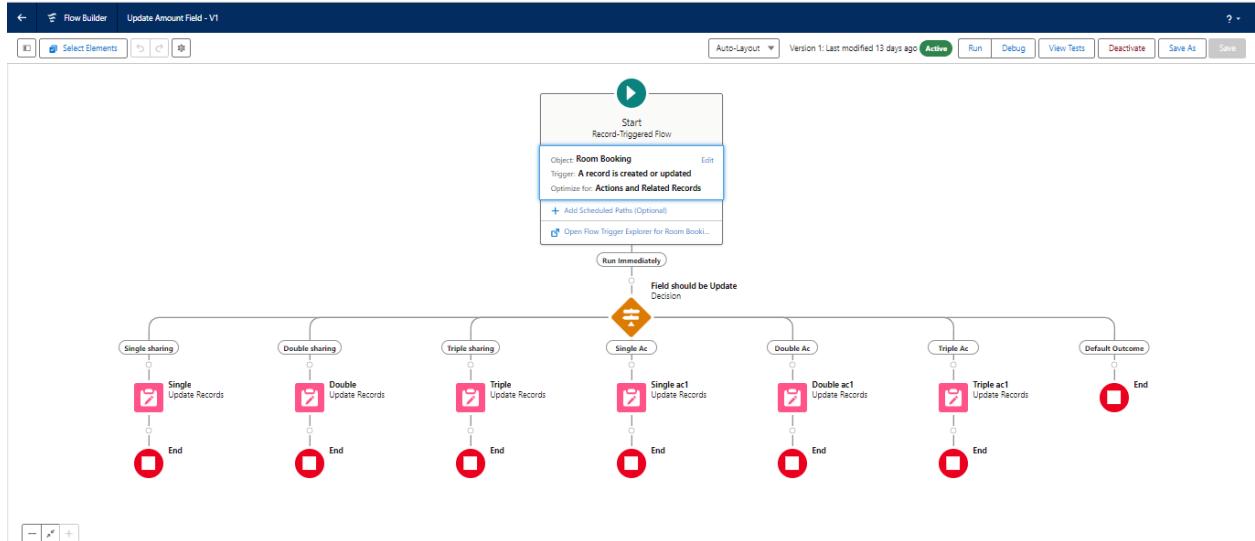
- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click on Done.

20. Enter the update records details

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

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

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



13.2. Test the Flow

1. Go to App Launcher and search for The Booking of Co-living and select the app
2. In the Co-living app click on the Room sharing tab and click on new.
3. Enter the details like Name, Room sharing, AC-3000, Advance payment for 1 Month. And the Amount field is empty before saving the record.

New Room Booking

Information

* = Required Information

Room No

Room Sharing: Single sharing

Name: Prasad

AC-3000:

Advance Payment for 1 Month:

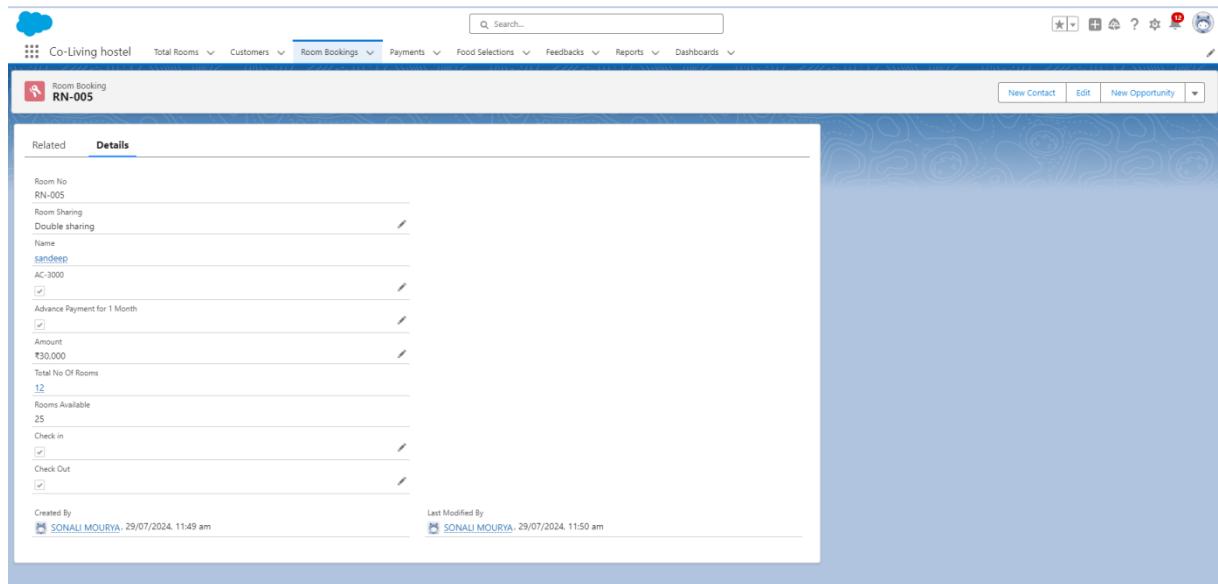
Amount:

Total No Of Rooms: 5

Check in:

Check Out:

Cancel Save & New Save



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