

A CRM Application to Manage the Booking of Co-Living



Name: Kurmadasu Swetha

Email : swethakurmadasu2003@gmail.com

PROJECT ABSTRACT:

The Co-living Space project is designed to cultivate a dynamic and welcoming community where individuals can live, work, and connect with others who share similar interests. Our belief is that by sharing a living space, we promote collaboration, reduce feelings of isolation, and ultimately improve the quality of life for everyone involved.

The co-living space will be thoughtfully designed, ensuring a balance between private living areas and communal spaces to encourage both personal comfort and social interaction.

The Co-living Space app will serve as a platform for users to store their personal details, allowing them to select from a variety of air-conditioned (AC) rooms with different sharing options. Users can also choose daily meal preferences, make payments through multiple payment methods, and provide feedback on services such as room cleanliness, internet connectivity, and food quality.

This approach emphasizes flexibility and customization, allowing residents to tailor their living experience to their needs while fostering a sense of community.

INDEX

<u>Title Name</u>	<u>Page no</u>
A CRM APPLICATION TO MANAGE THE BOOKING OF CO-LIVING	
PROJECT ABSTRATCT	2
<u>TASK</u>	4_7
1.Salesforce	
2.Object	12_12
3.Tab	12_16
4.The Lighthing App	16_18
5.Fields & Relationships	18_64
6.Validation rule	64_66
7.Profile	66_71
8.Roles	71_73
9.Users	73_76
10.User Adoption	76_79
11.Reports	79_81
12.Dashboards	81_83
13.Flows	83_99

TASK 1- Salesforce:

Introduction: Are you just getting started with Salesforce and feeling uncertain about what it does or how to use it? Perhaps you're unsure where to begin your learning path? If any of these questions resonate with you, don't worry—you've come to the right place. This module is specifically tailored for beginners like you.

Welcome to Salesforce, a powerful and transformative platform that offers a wide range of tools designed to improve productivity and efficiency. Whether you're part of a sales team or working in a different capacity, Salesforce helps you work smarter, close deals faster, and streamline your day-to-day tasks.

As you go through this learning journey, we'll introduce you to the core features of Salesforce and break down exactly what it is and why it's such a game-changer for businesses of all sizes. By the time you finish this module, you'll have a solid understanding of how Salesforce works and feel confident in using it to boost your performance. Plus, you'll earn a badge that signifies your progress in mastering this powerful tool!

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

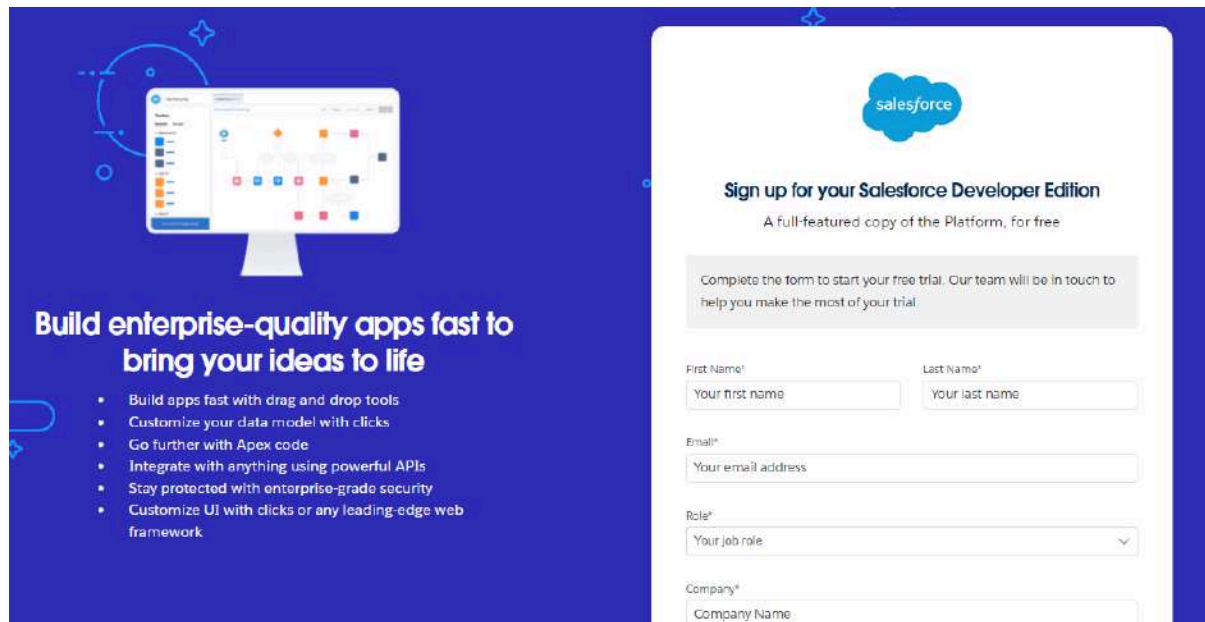
products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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:

Activity 1:

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 :

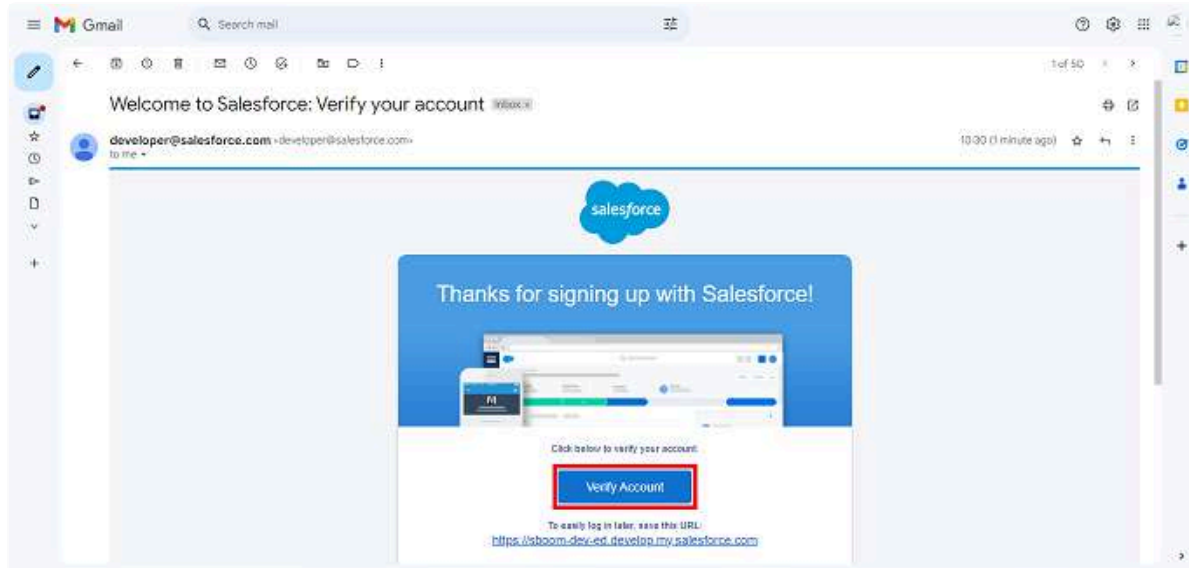
username@organization.com

Click on sign me up after filling these.

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



Change Your Password

Enter a new password for **lead@sb.com**.
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

 Good

* Confirm New Password

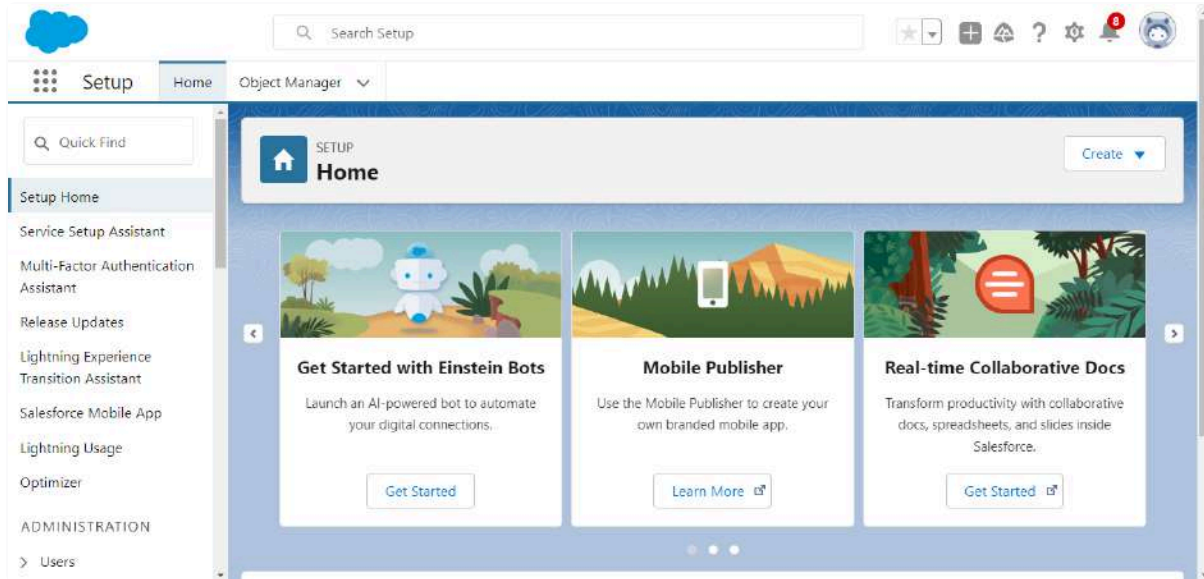
 Match

Security Question

* In what city were you born?

* Answer

Change Password



Task2: Object:

What Is an Object?

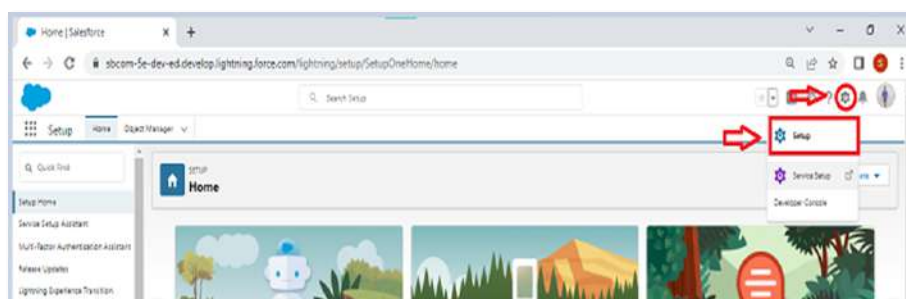
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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.

To Navigate To Setup page:

Click on gear icon ? click setup.



Objects and fields involved in Co-Living:

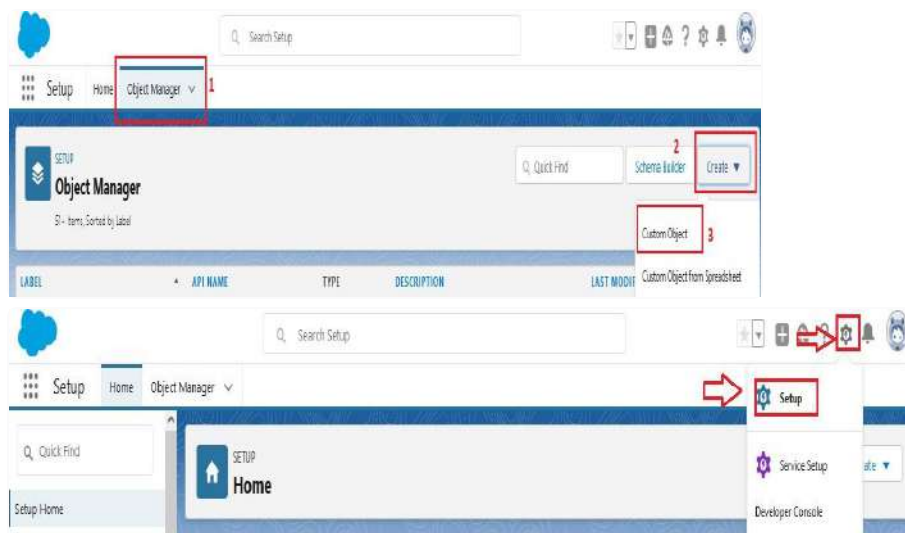


Activity1:

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.

The screenshot shows the 'New Custom Object' setup page in Salesforce. Red boxes and arrows highlight the following steps:

- Step 1:** The 'Label' field is set to 'Total Room' and the 'Plural Label' is set to 'Total Rooms'.
- Step 2:** The 'Object Name' field is set to 'Total_Rooms'.
- Step 3:** The 'Record Name' field is set to 'Total No Of Rooms' and the 'Data Type' is set to 'Text'.
- Optional Features:** The 'Allow Reports' checkbox is checked.
- Deployment Status:** The 'Deployed' radio button is selected.
- Search Status:** The 'Allow Search' checkbox is checked.
- Object Creation Options:** The 'Add Notes and Attachments related list to default page layout' checkbox is checked.

At the bottom of the page, there are buttons for 'Back', 'Save & New', and 'Cancel', with red arrows pointing to them.

Activity 2:

Create a custom object for Customer:

To create a custom object, follow these steps:

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

Activity 3:

Create a custom object for Room Booking

To create a custom object, follow these steps:

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

Activity 4:

Create a custom object for Payment

To create a custom object, follow these steps:

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

Activity 5:

Create a custom object for Food Selection

To create a custom object, follow these steps:

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

10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

Activity 6:

Create a custom object for Feedback

To create a custom object, follow these steps:

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

Task3: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.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Activity1:

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)

SETUP
Tabs

Gold Partner User	Default On
High Volume Customer Portal	Default On
High Volume Customer Portal User	Default On
Identity User	Default On
Marketing User	Default On
Minimum Access - Salesforce	Default On
Partner App Subscription User	Default On
Partner Community Login User	Default On
Partner Community User	Default On
Read Only	Default On
Salesforce API Only System Integrations	Default On
Silver Partner User	Default On
Solution Manager	Default On
Standard Platform User	Default On
Standard User	Default On
System Administrator	Default On

Previous Next Cancel

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

SETUP
Tabs

Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Bot Solutions (standard__LightningBot)	<input type="checkbox"/>
Co-Living (CoLiving)	<input checked="" type="checkbox"/>

☒ Append tab to users' existing personal customizations

Previous Save Cancel

Activity 2:

Create a Tab for Customers

To create a Tab:(Customers)

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

2. Select Object(Customers) > Select the tab style > Next (Add to profiles page) keep it as default > Next (Add to Custom App) keep it as default > Save.

Activity 3:

To create a Tab for Room Bookings

To create a Tab:(Room Bookings)

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

Activity 4:

Create a Tabs For Remaining Objects

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

Task 4: The Lightning App

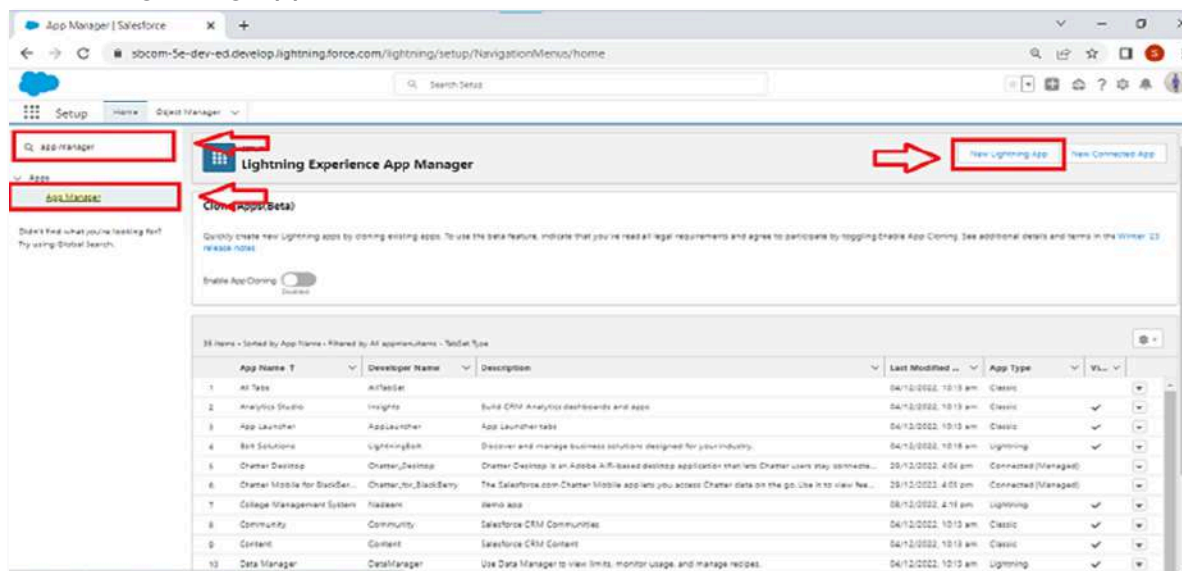
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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

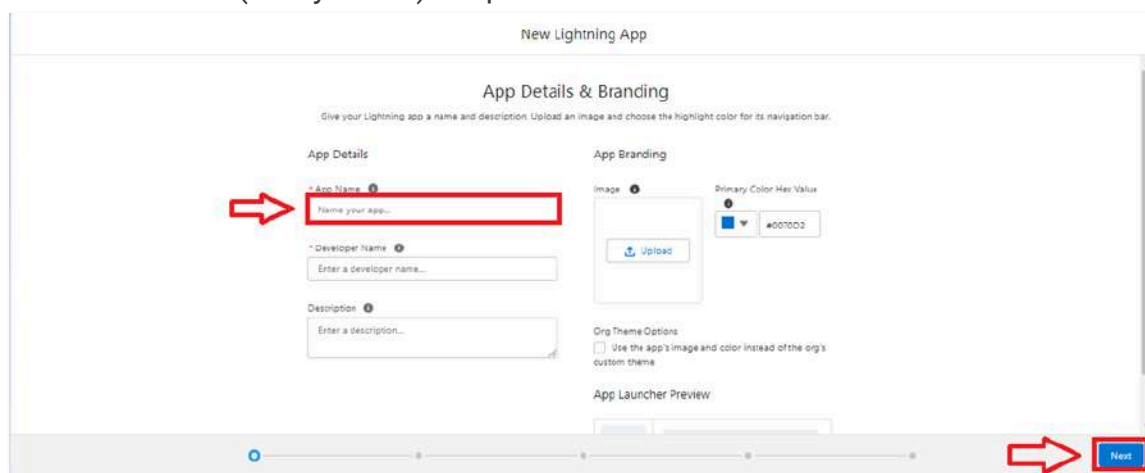
Activity 1:

To create a lightning app page:

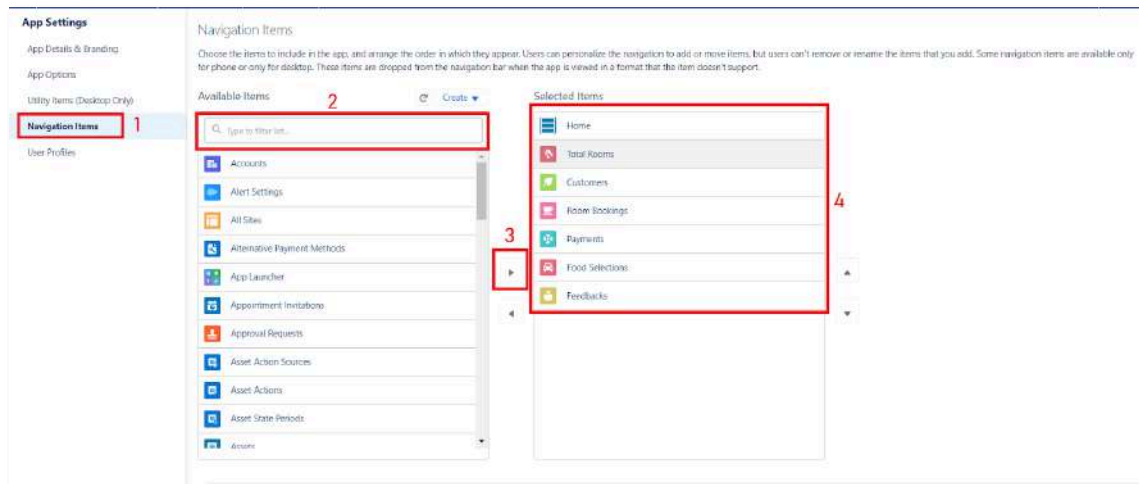
1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.



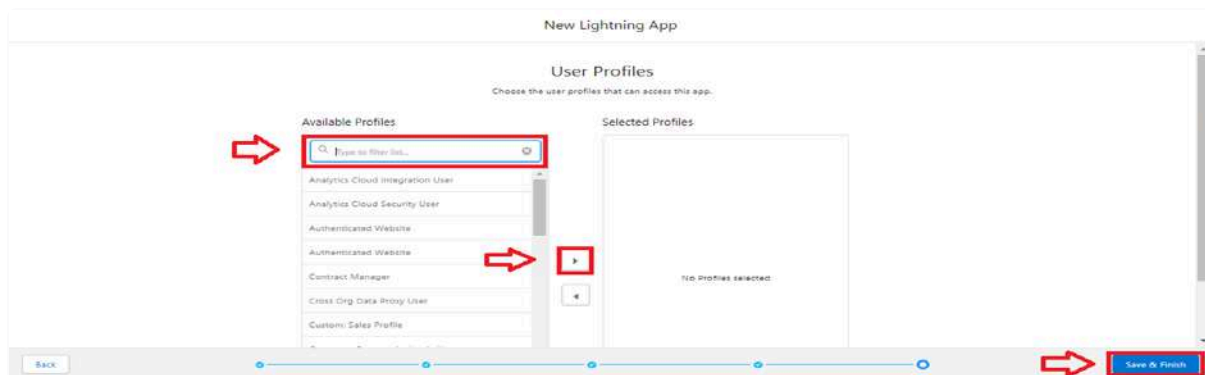
2. Fill the app name in app details and branding > Next > (App option page) keep it as default > Next > (Utility Items) keep it as default > Next.



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



4. To Add User Profiles:



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

Task 5:

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:

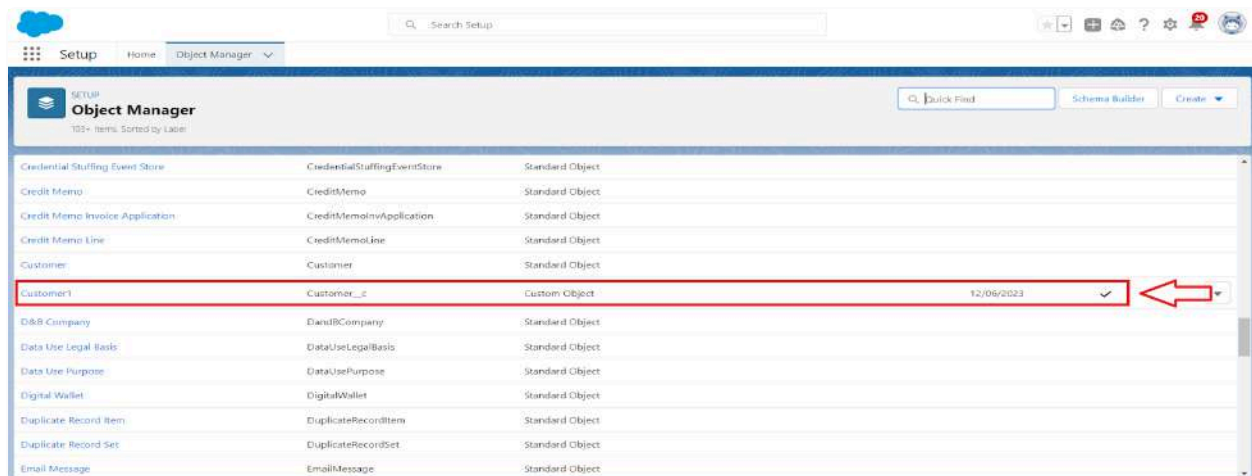
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on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

Activity 1:

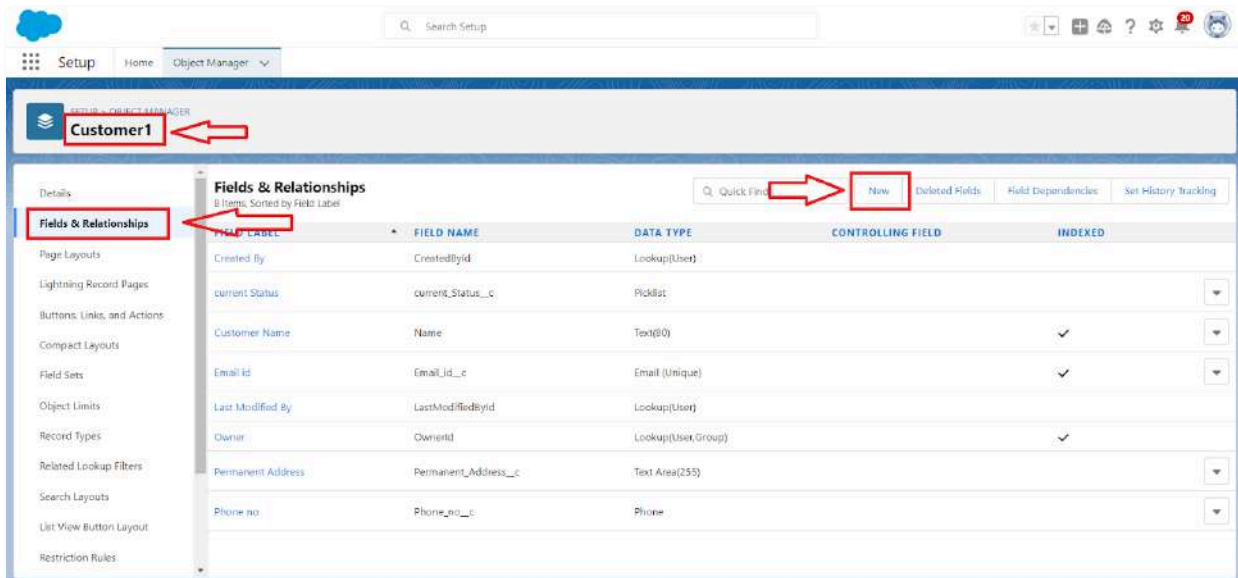
Creation of fields for the customer1 object

1. To create fields in an object:

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



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



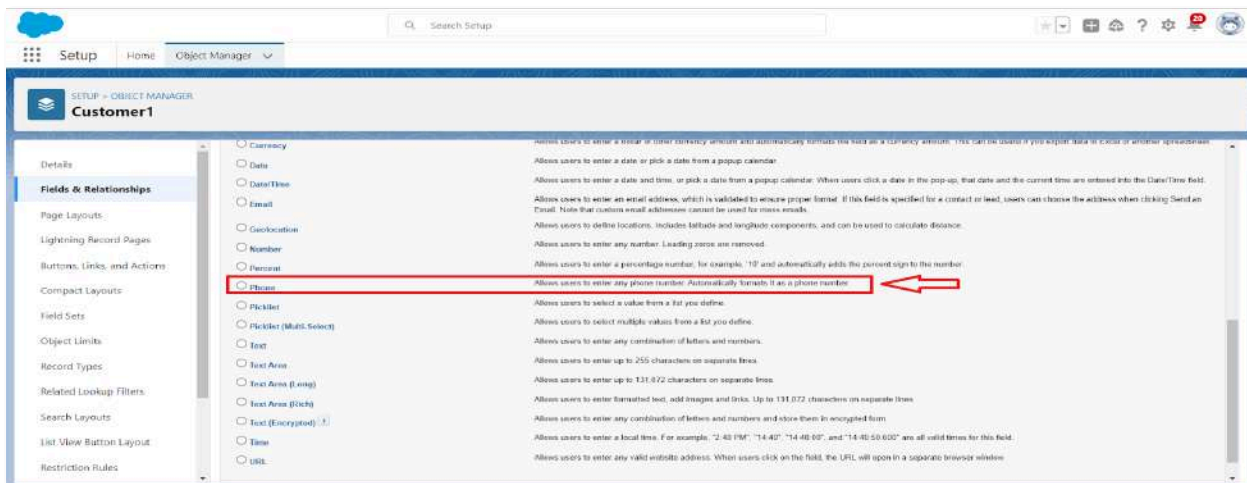
Customer1

Fields & Relationships

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

3. Select Data Type as a "Phone"



Customer1

Fields & Relationships

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

4. Click on next

The screenshot shows the Salesforce Setup interface for editing a custom field. The left sidebar contains navigation links like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Edit Customer1 Custom Field' and 'Phone no'. The 'Field Information' section is highlighted with a red box and an arrow pointing to the 'Field Label' field, which contains 'Phone no'. The 'Field Name' field contains 'PHONE__c'. The 'Data Type' is set to 'Phone'. The 'General Options' section shows the 'Required' checkbox checked and the 'Default Value' field empty. The 'Save' button is highlighted with a red box and an arrow pointing to it.

5. Fill the Above as following:

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

2. To create another fields in an object:

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

3. To create another fields in an object:

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

4. To create another fields in an object:

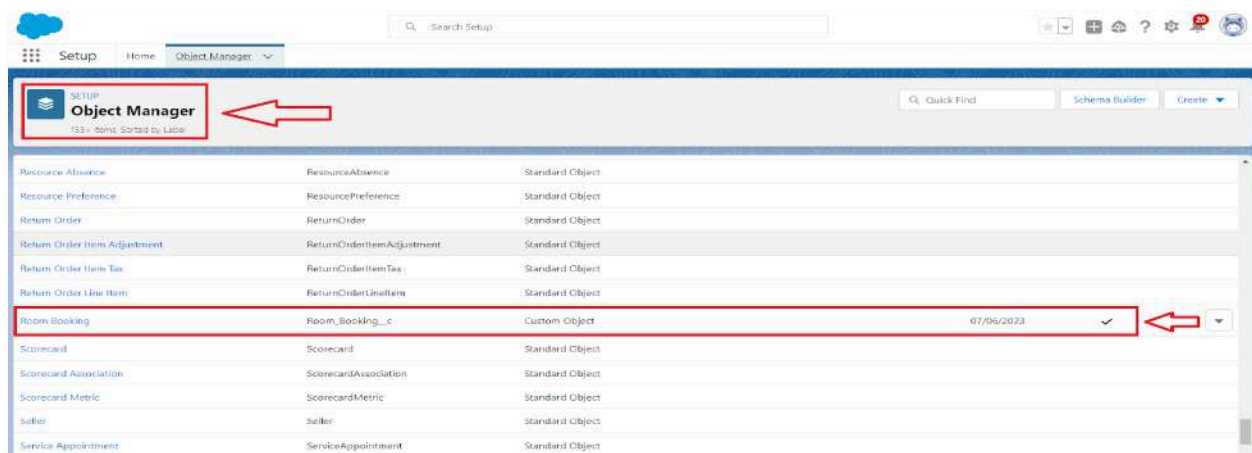
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data type as a "Picklist" and Click on Next
4. Fill the Above as following:
 - Field Label: Current Status
 - Value - Select enter values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

Activity 2:

Creation of fields for the Room Booking object

1. To create fields in an object:

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



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

Setup > OBJECT MANAGER

Room Booking

Details

Fields & Relationships

3 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

3. Select Data Type as a "Picklist"

Setup > OBJECT MANAGER

Room Booking

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

- ☐ Checkbox
- ☐ Currency
- ☐ Date
- ☐ Date/Time
- ☐ Email
- ☐ Geolocation
- ☐ Number
- ☐ Percent
- ☐ Phone
- ☒ **Picklist**
- ☐ Picklist (Multi-Select)
- ☐ Text
- ☐ Text Area
- ☐ Text Area (Large)
- ☐ Text Area (Rich)
- ☐ Text (Encrypted)
- ☐ Time
- ☐ URL

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

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

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

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

Allows users to enter any combination of letters and numbers.

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

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

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

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

Allows users to enter a local time. For example, "2:48 PM", "14:48", "14:40:00", and "14:40:50.000" 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

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.

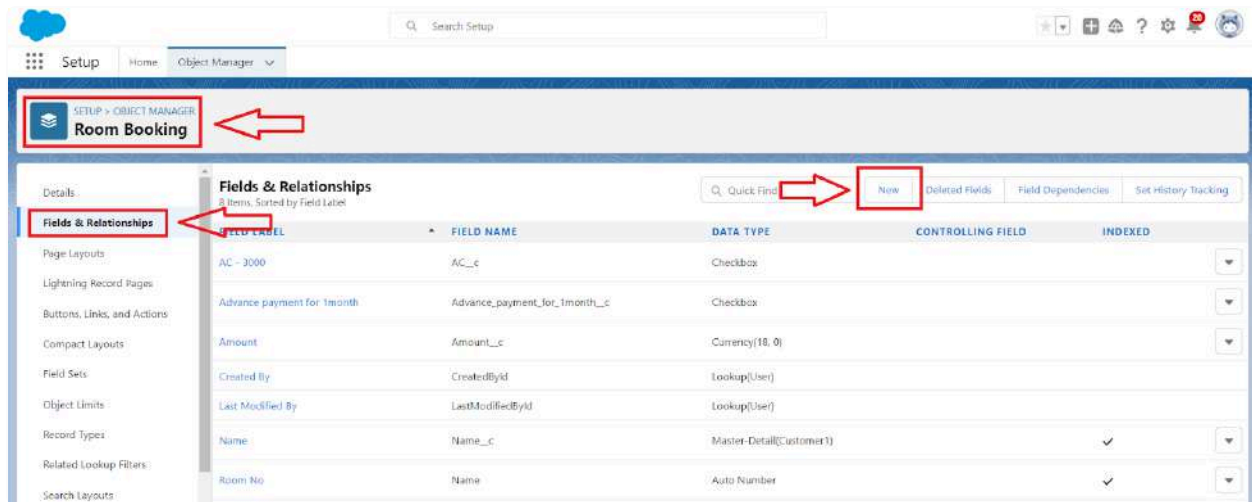
2. To Create a Fields & Relationship to an Room Booking Object

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.

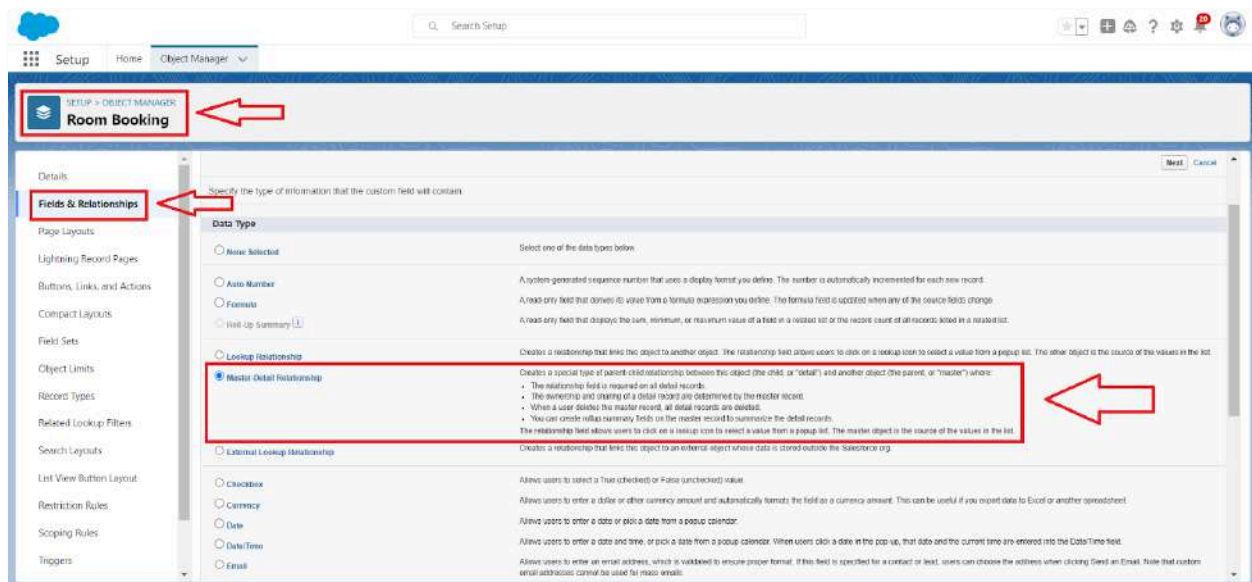
Name	Internal Name	Type
Resource Absence	ResourceAbsence	Standard Object
Resource Preference	ResourcePreference	Standard Object
Return Order	ReturnOrder	Standard Object
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object
Return Order Item Tax	ReturnOrderItemTax	Standard Object
Return Order Line Item	ReturnOrderLineItem	Standard Object
Room Booking	Room_Booking__c	Custom Object
Scorecard	Scorecard	Standard Object
Scorecard Association	ScorecardAssociation	Standard Object
Scorecard Metric	ScorecardMetric	Standard Object
Seller	Seller	Standard Object
Service Appointment	ServiceAppointment	Standard Object

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

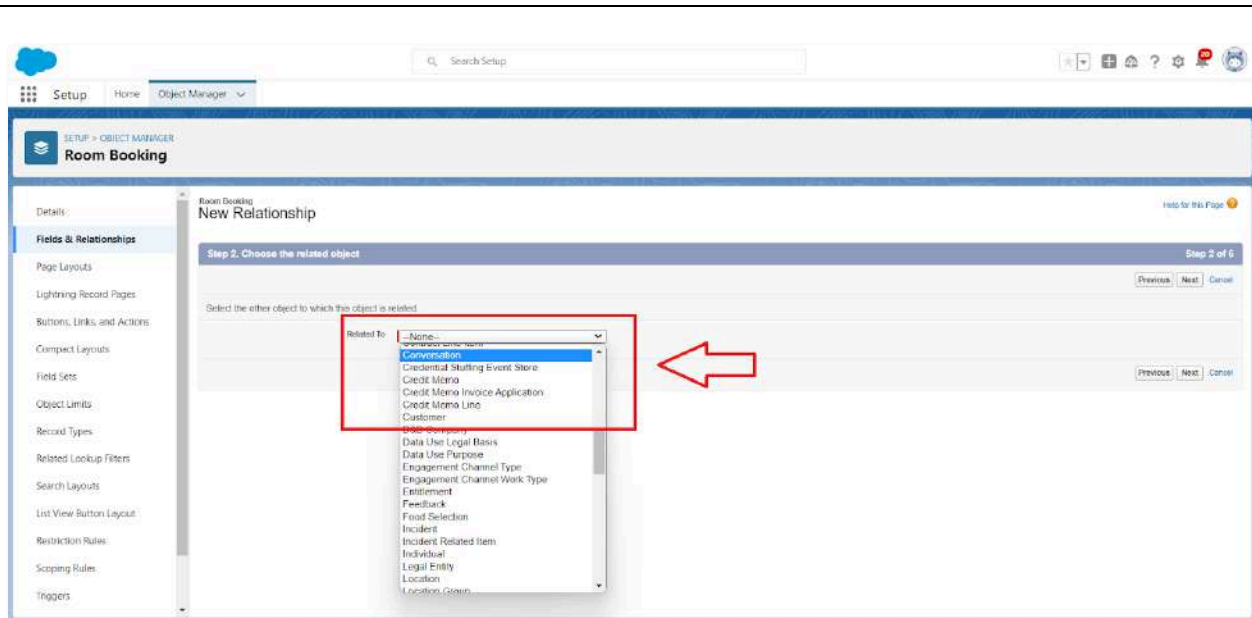


3. Select Data Type as a “Master-detail Relationship”

4. Click on Next

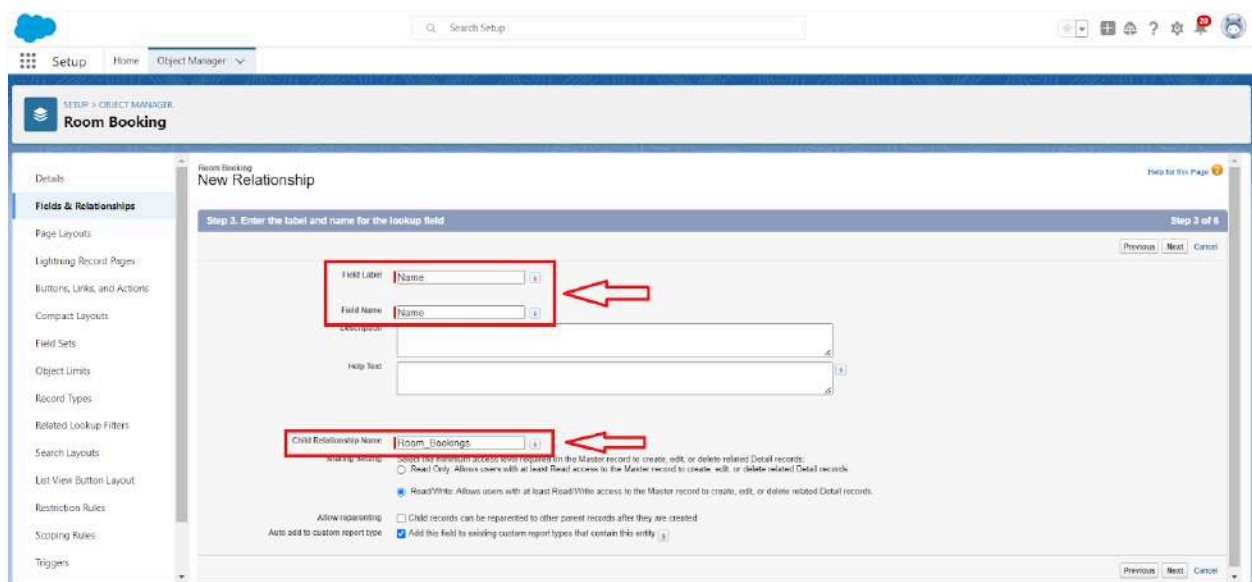


5. Click on the Related to drop down and Select the “Customer1” object and click on Next



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.

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

Previous Next Cancel

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

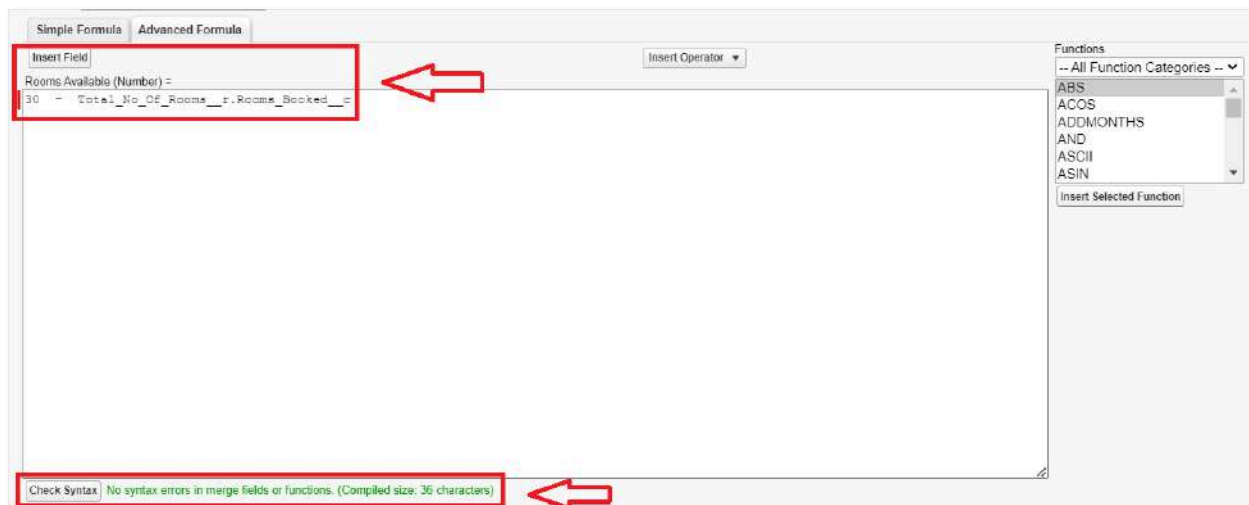
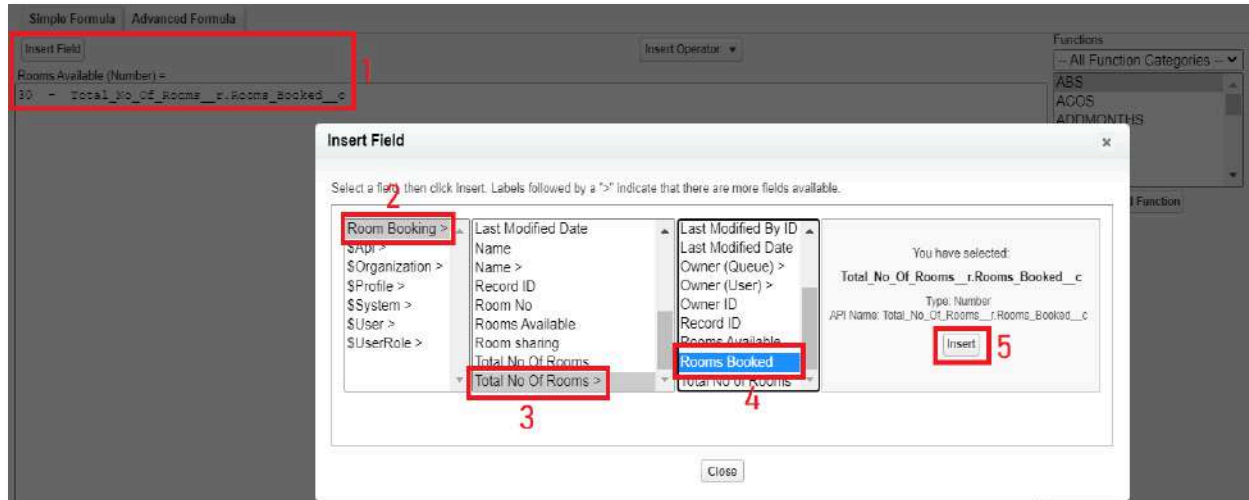
All records should be included in the calculation
Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

7. Click on Next > Next > Save and new

8. To create fields in an object:

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



- Click on Next > Next > Save and new.

9. To create fields in an object:

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

10. To create fields in an object:

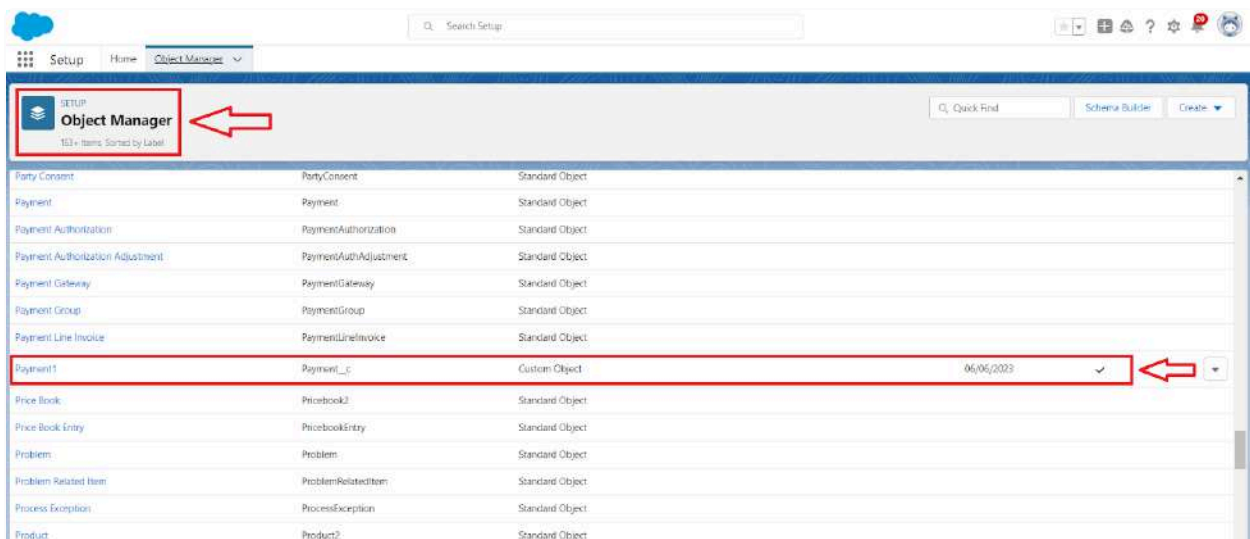
1. Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
2. Now click on "Fields & Relationships" ? New
3. Select Data Type as a "Checkbox"
4. Click on Next
5. Fill the Above as following:
 - Field Label: Check Out
 - Field Name :It's gets auto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

Activity 3:

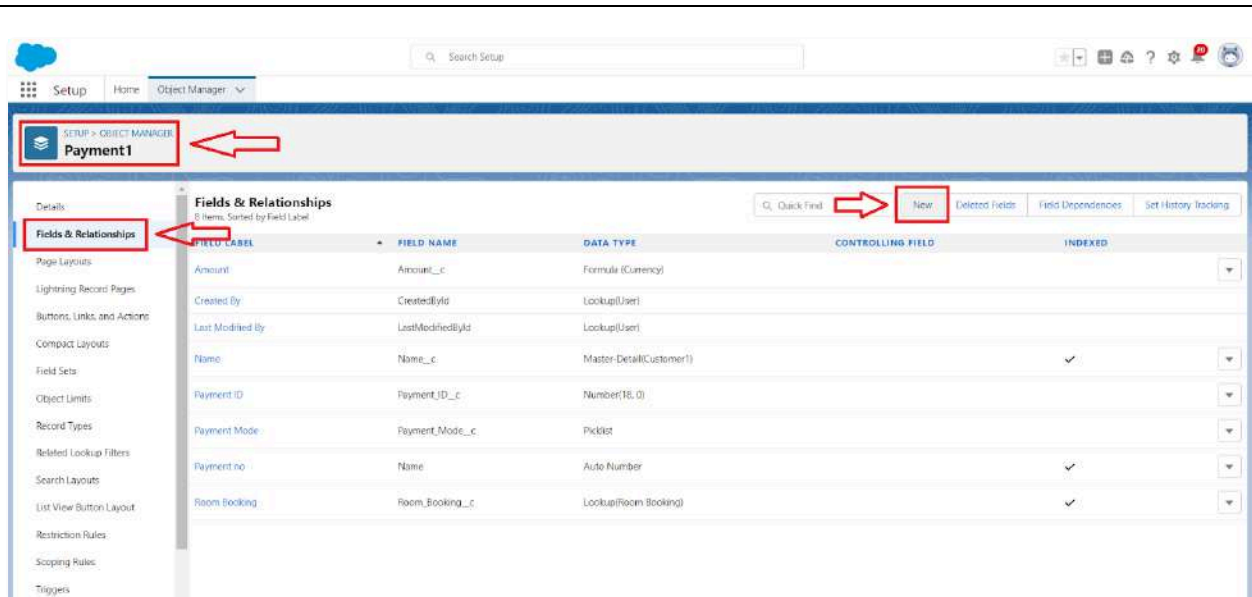
Creation of Fields & Relationship for Payment1 Object

1. To create fields & relationship to an object:

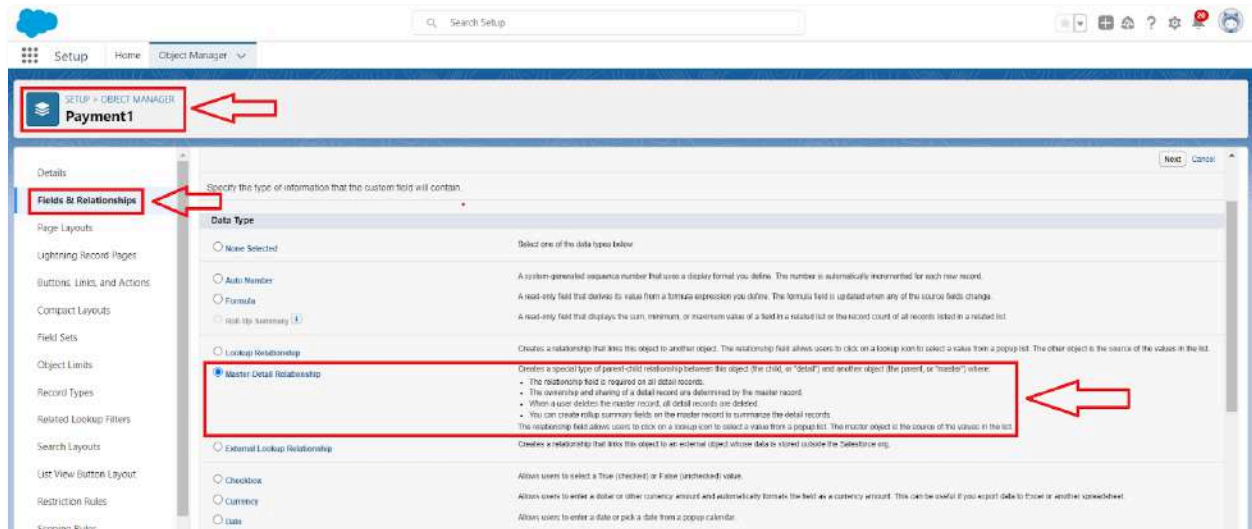
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.



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



3. Select Data Type as a "Master-detail Relationship"



4. Click on Next

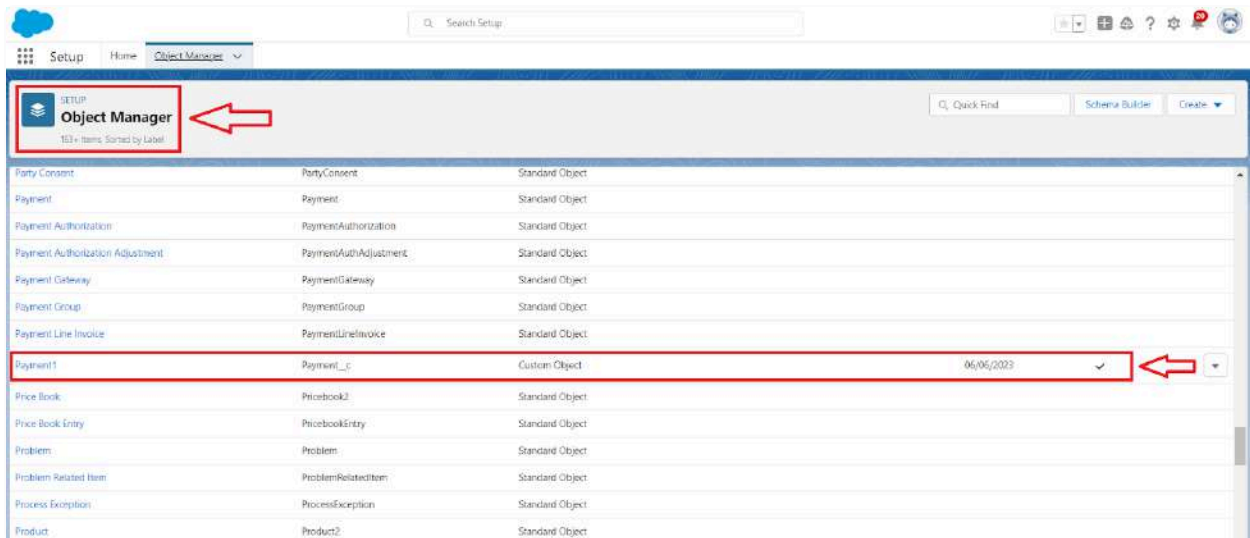
5. Click on the Related to drop down and Select the Customer1 object and click on Next

6. Fill the Above as following:

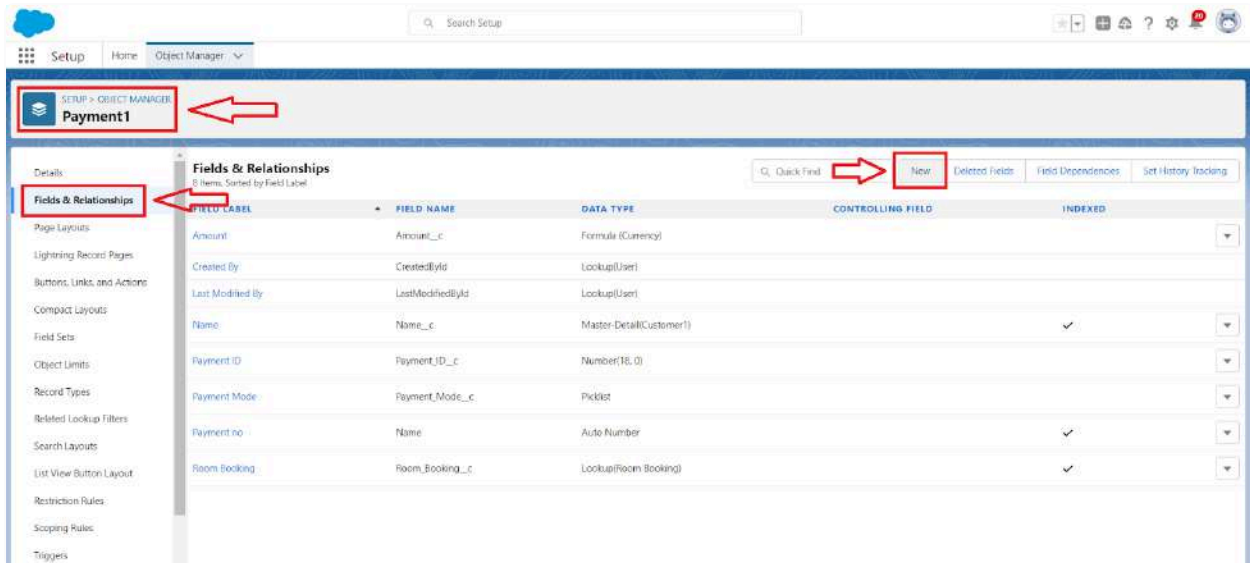
- Change the Field Label: Name
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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.

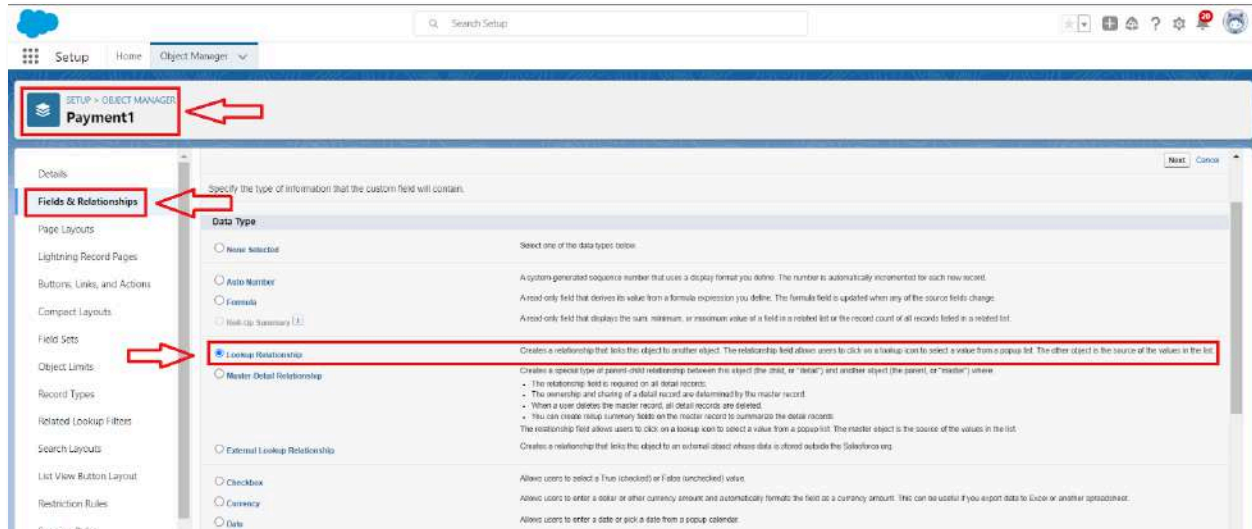


2. Now click on “Fields & Relationships” > New

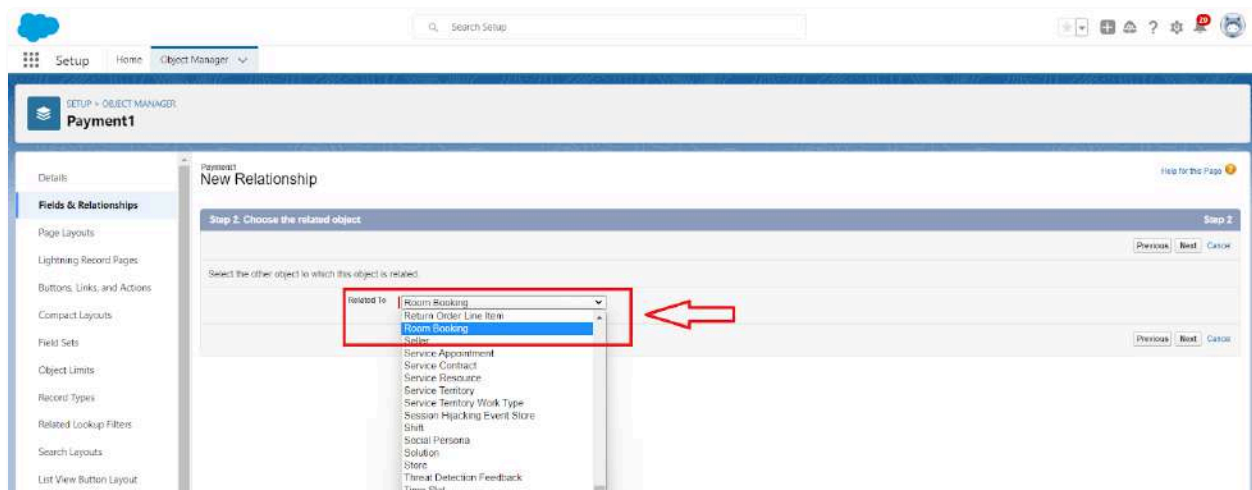


3. Select Data Type as a “Lookup Relationship”

4. Click on Next



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



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

Field Label: Room Booking

Field Name: Room_Booking

Child Relationship Name: Payments1

What to do if the lookup record is deleted?

Don't allow deletion of the lookup record that's part of a lookup relationship.

Lookups Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Get assistance](#)

► Show Filter Settings

6. Fill the Above as following:

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

3. Creation of another fields for the Payment1 object

To create fields in an object:

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

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

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

Setup > OBJECT MANAGER
Payment1

Details
Fields & Relationships
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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

3. Select Data Type as a “Picklist”

Setup > OBJECT MANAGER
Payment1

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

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

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 popup calendar.
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distances.
Allows users to enter any number. Leading zeros are removed.
Allows users to enter a percentage number, for example, 10% and automatically adds the percent sign to the number.
Allows users to enter any phone number. Automatically formats it as a phone number.
Allows users to select a value from a list you define.
Allows users to select multiple values from a list you define.
Allows users to enter any combination of letters and numbers.
Allows users to enter up to 255 characters on separate lines.
Allows users to enter up to 131,072 characters on separate lines.
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Allows users to enter a local time. For example, "2:49 PM", "14:00", "14:00:00", and "14:00:58.000" are all valid times for this field.

The screenshot shows the Salesforce Setup interface for configuring a custom object named 'Payment1'. The 'Fields & Relationships' tab is active. The 'Field Label' is 'Payment Mode'. The 'Values' section is expanded, showing a list of values: Cash, Check, Credit card, Debit card, UPI, Phonepe, Gpay, Paytm. The 'Field Name' is 'Payment_Mode'. The 'Required' checkbox is checked. The 'Add this field to existing custom report types that contain this entity' checkbox is also checked. The 'Field Format' is set to 'Text'.

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.

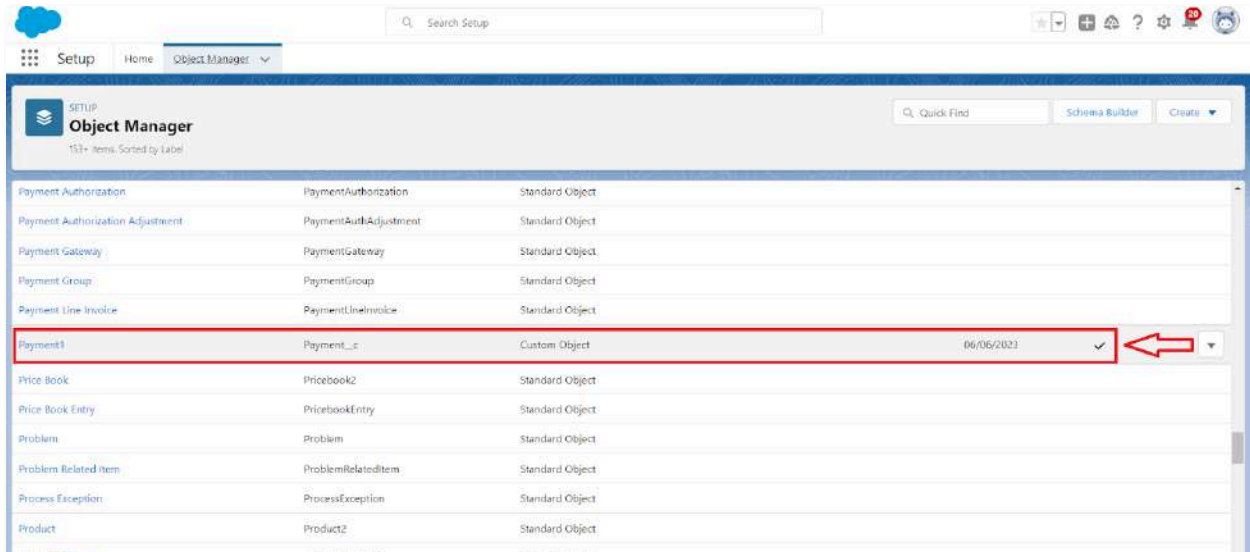
Why do we need to create the Cross Object Formula Field:

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

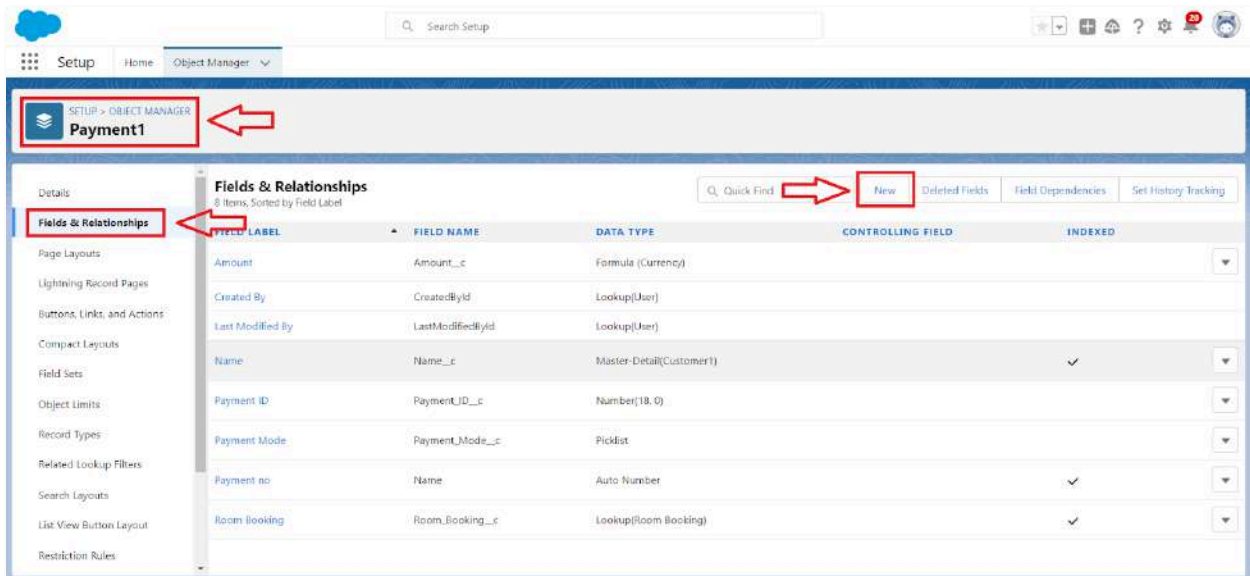
objects and relate the field with formula data type.

4. Create a Cross object formula Field in Payment1 Object

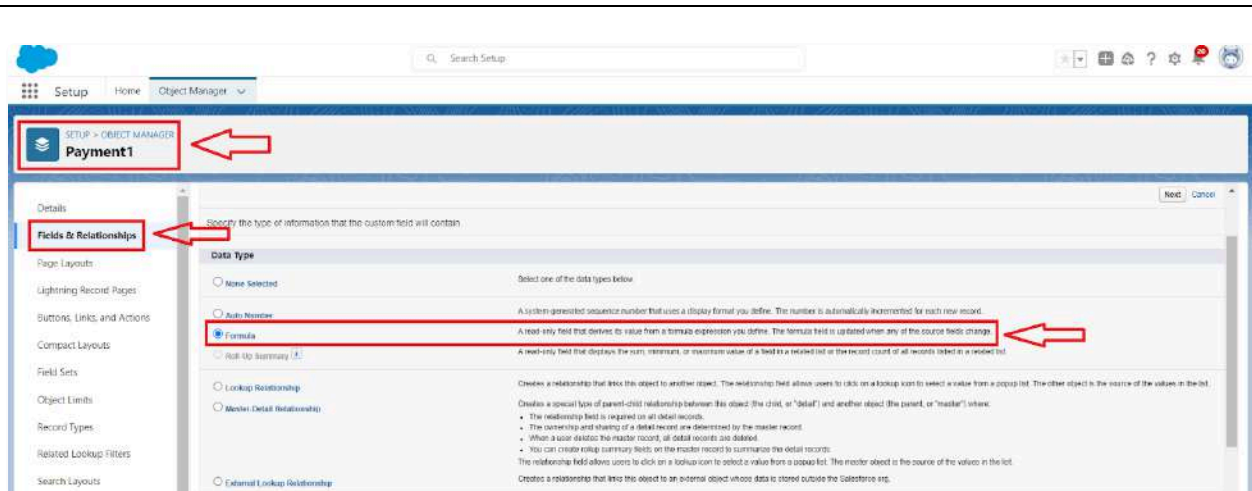
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.



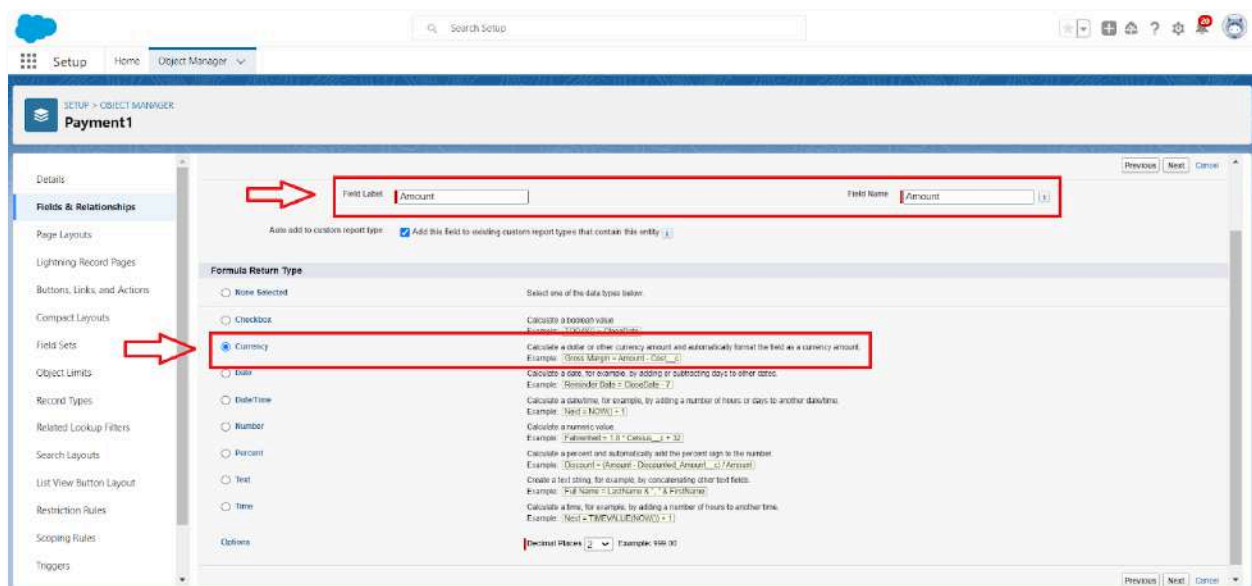
2. Now click on "Fields & Relationships" > New



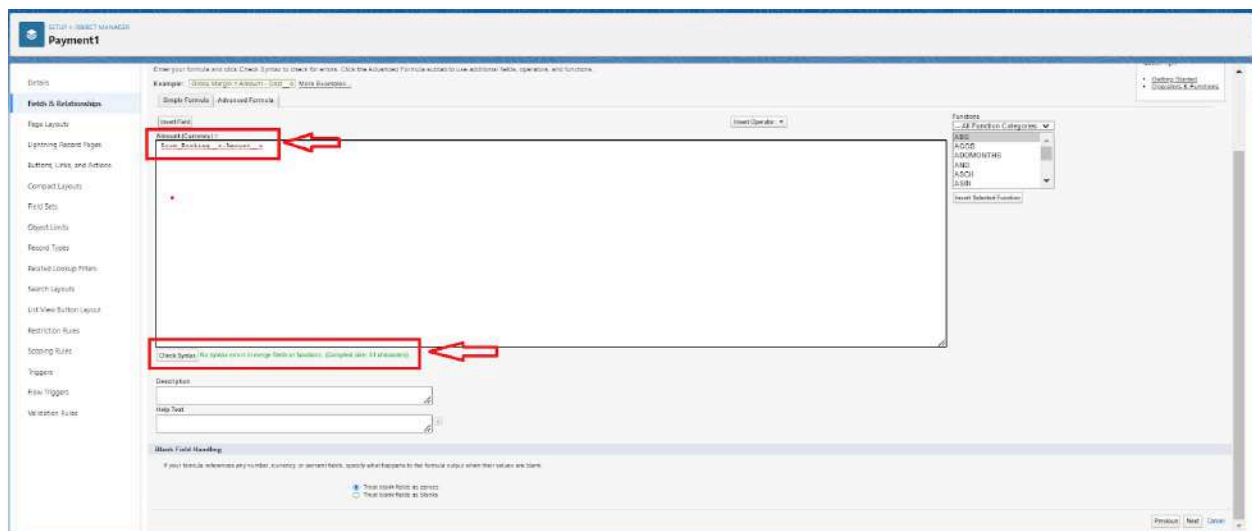
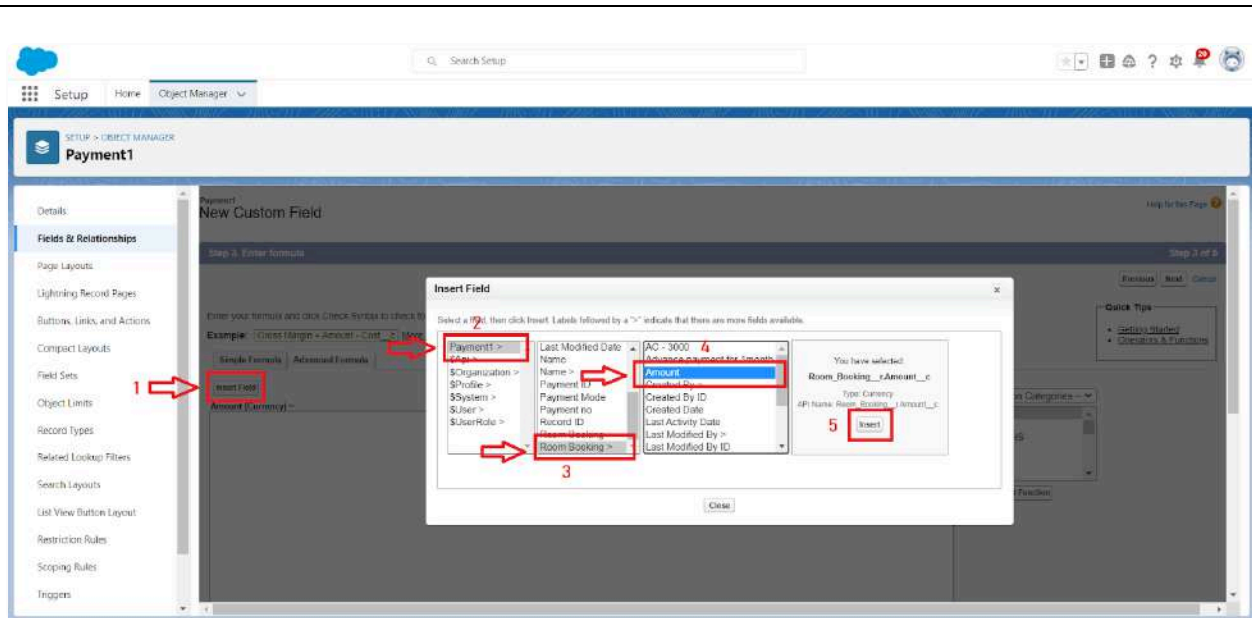
3. Select Data Type as a "Formula"
4. Click on Next



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



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



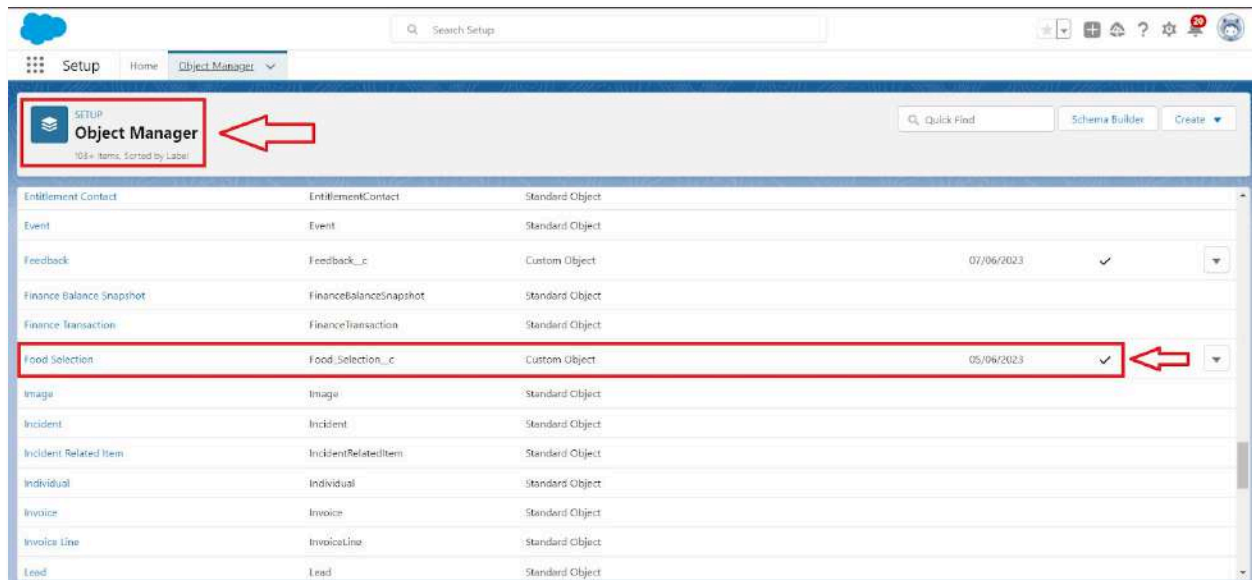
7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.

Activity 4:

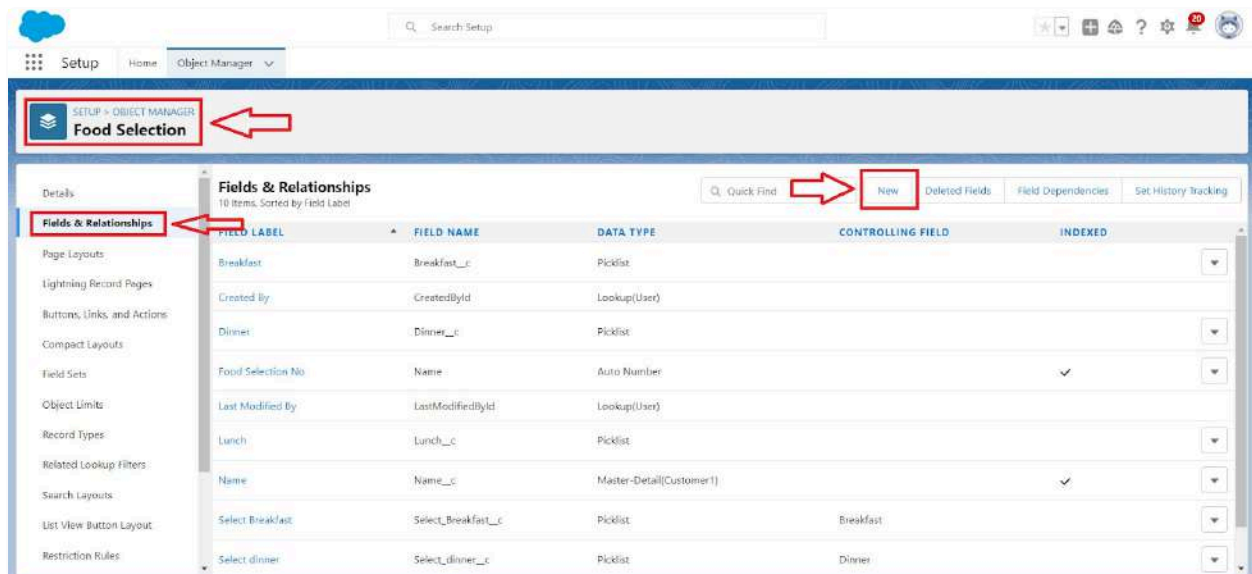
Creation of fields for the Food Selection object

1. To create fields & relationship to an object:

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

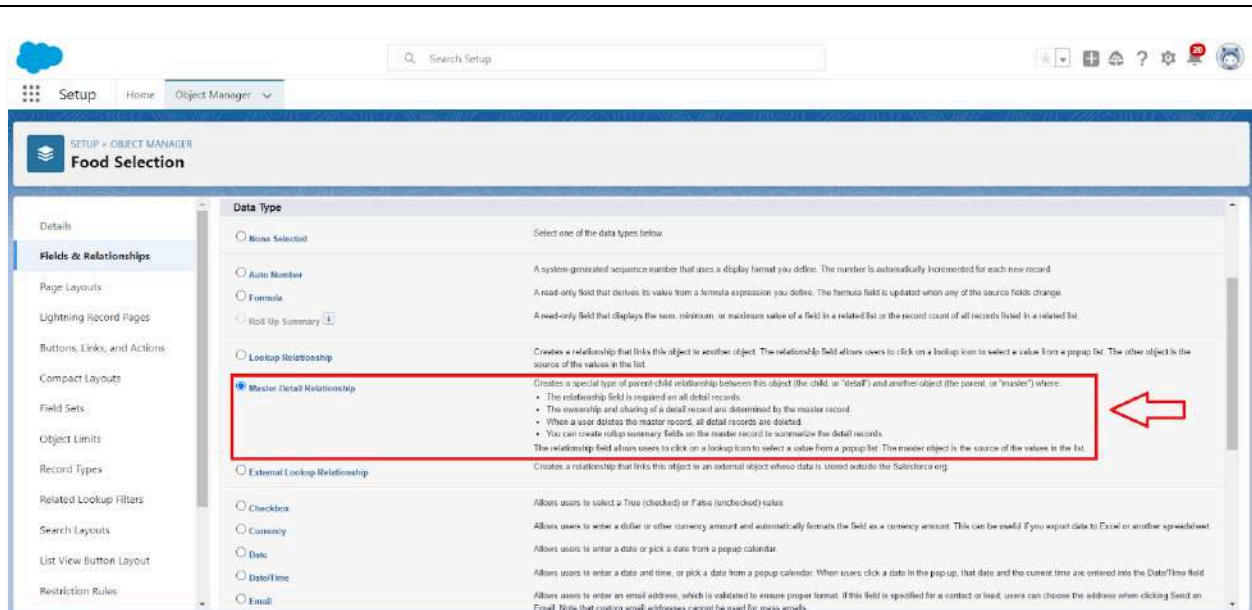


2. Now click on “Fields & Relationships” > New

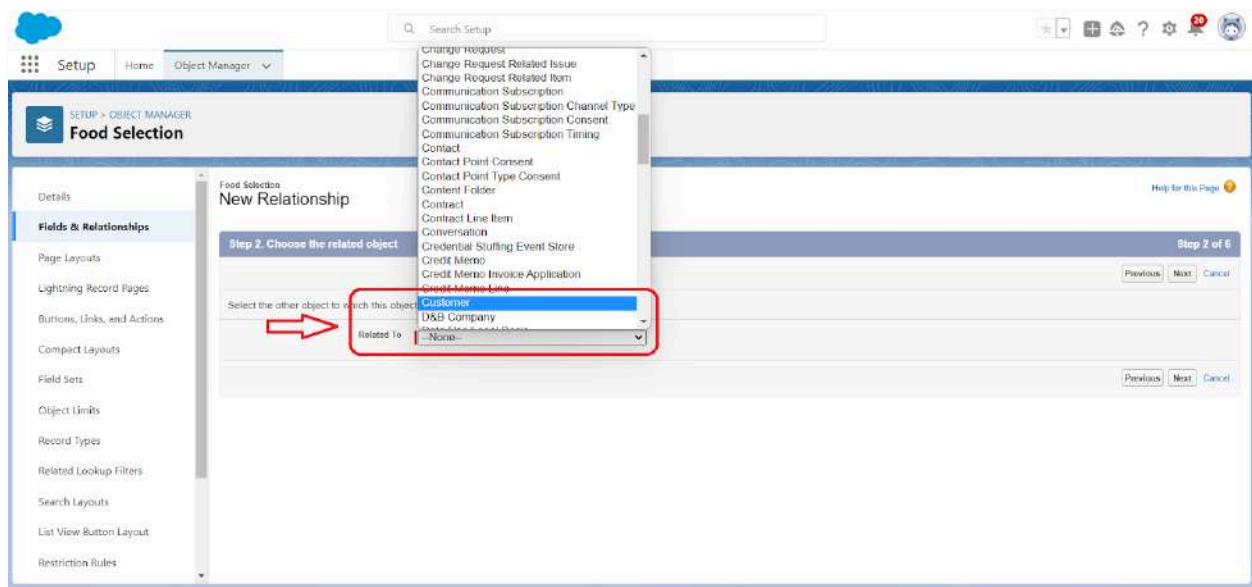


3. Select Data Type as a “Master-detail Relationship”

4. Click on Next



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



The screenshot shows the Salesforce Setup interface for configuring a new object named 'Food Selection'. The 'Fields & Relationships' section is selected in the left sidebar. The 'Step 3. Enter the label and name for the lookup field' dialog is open, showing the following fields:

- Field Label:** Name
- Field Name:** Name
- Child Relationship Name:** Food_Selections

Red boxes and arrows highlight the 'Field Label', 'Field Name', and 'Child Relationship Name' fields. The 'Child Relationship Name' field is also highlighted with a red box and an arrow. The 'Child Relationship Name' field is also highlighted with a red box and an arrow.

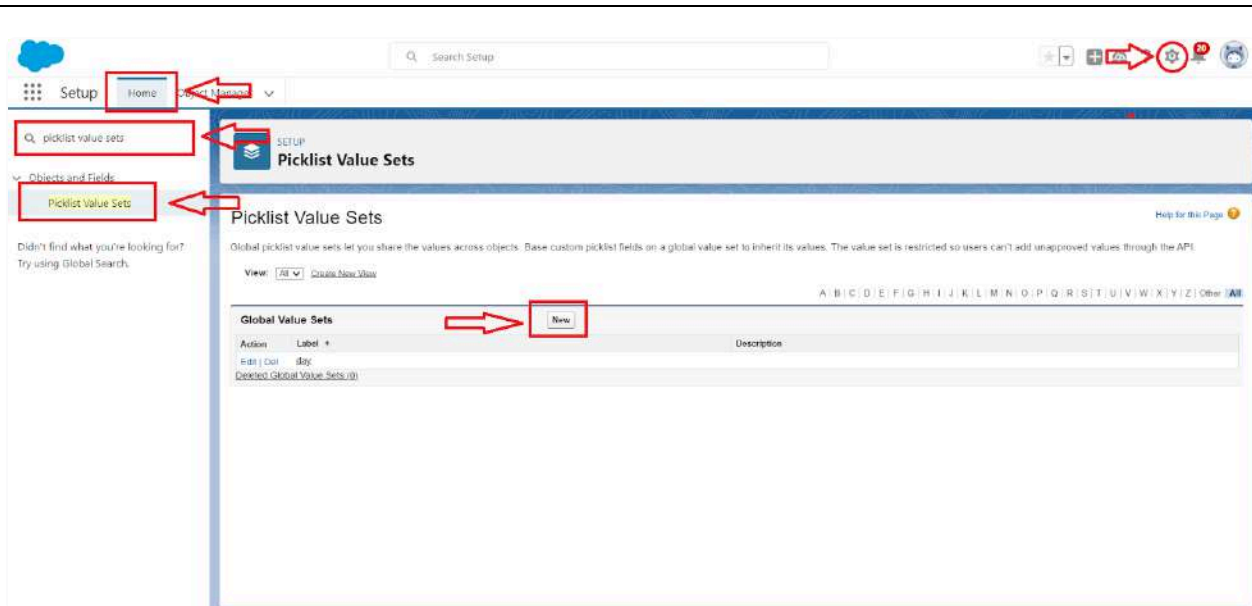
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

Picklist value sets:

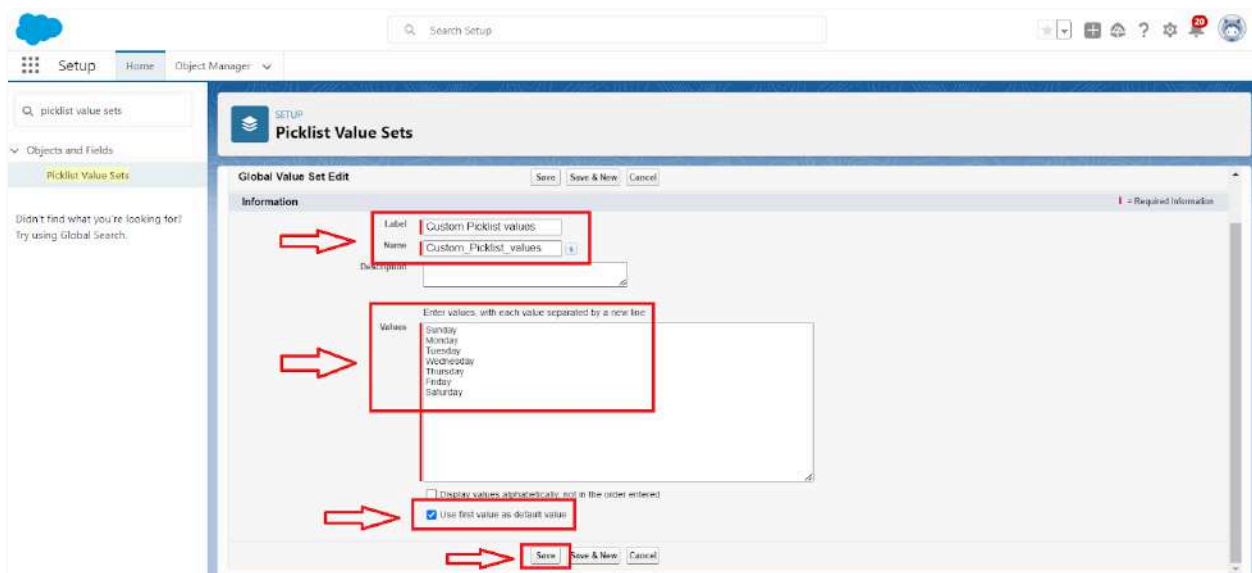
Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

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

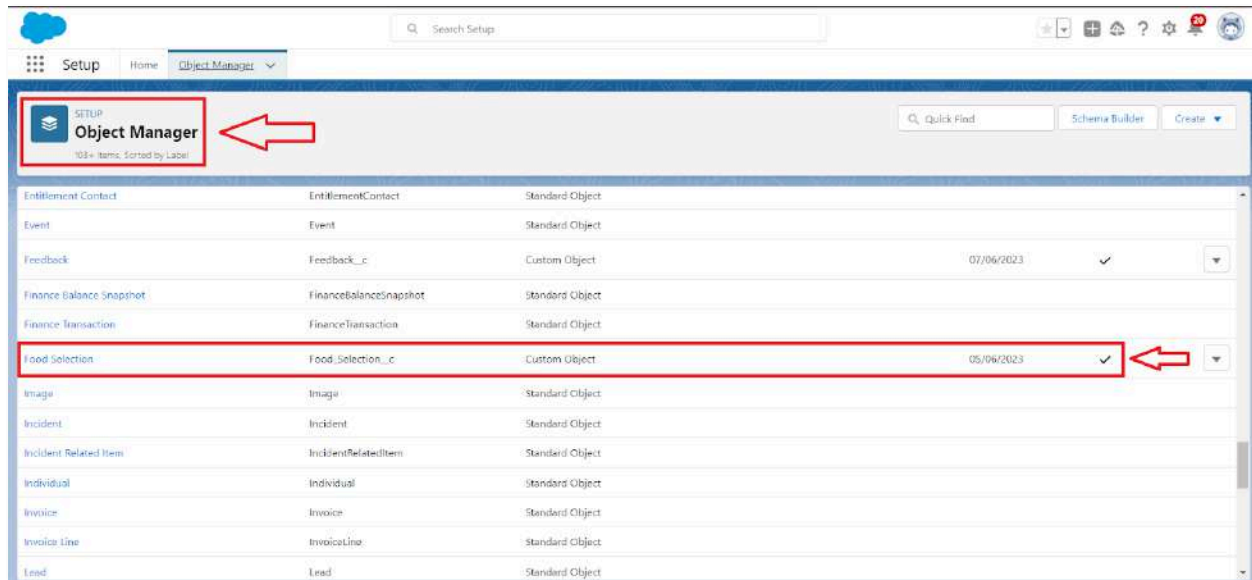


6. Check the Use first value as default value and Click on save.

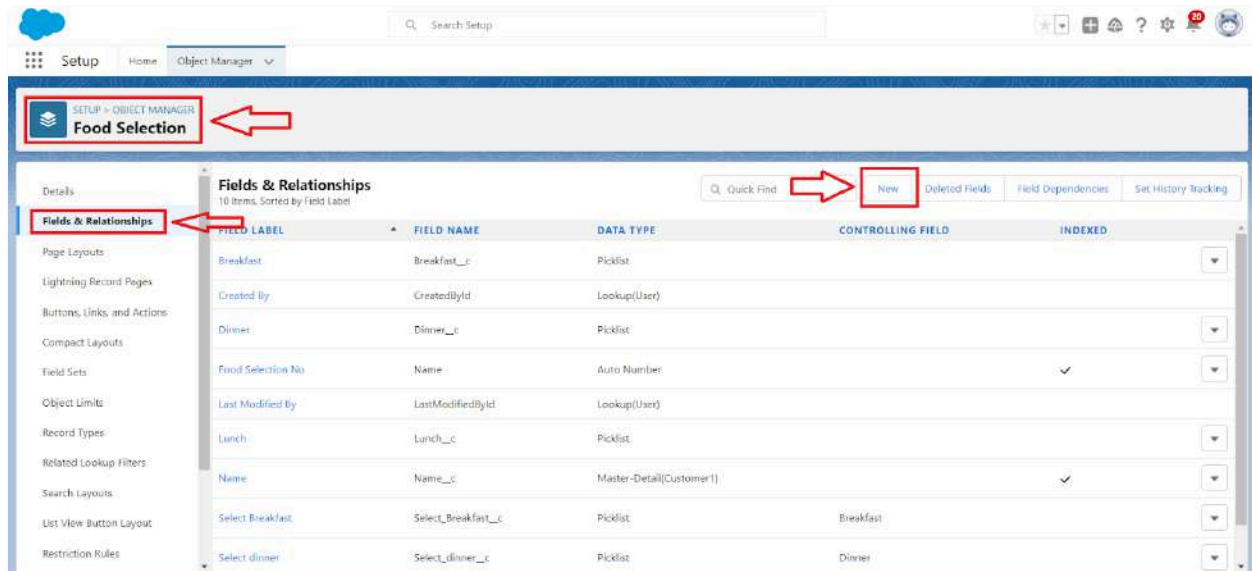
2. Create a picklist Field for Food selection object

To create fields in an object:

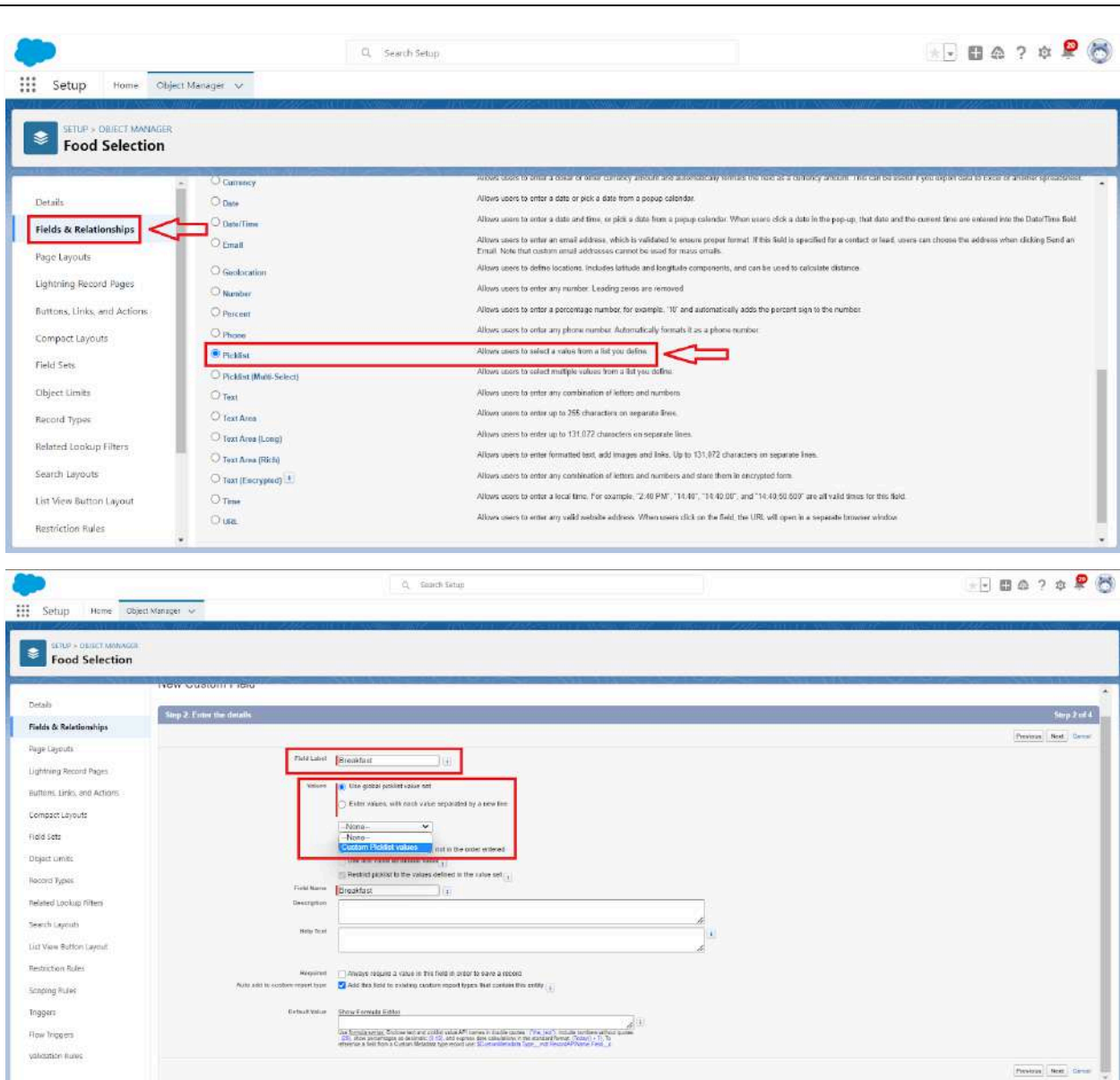
1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.



2. NewNow click on “Fields & Relationships” >



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.

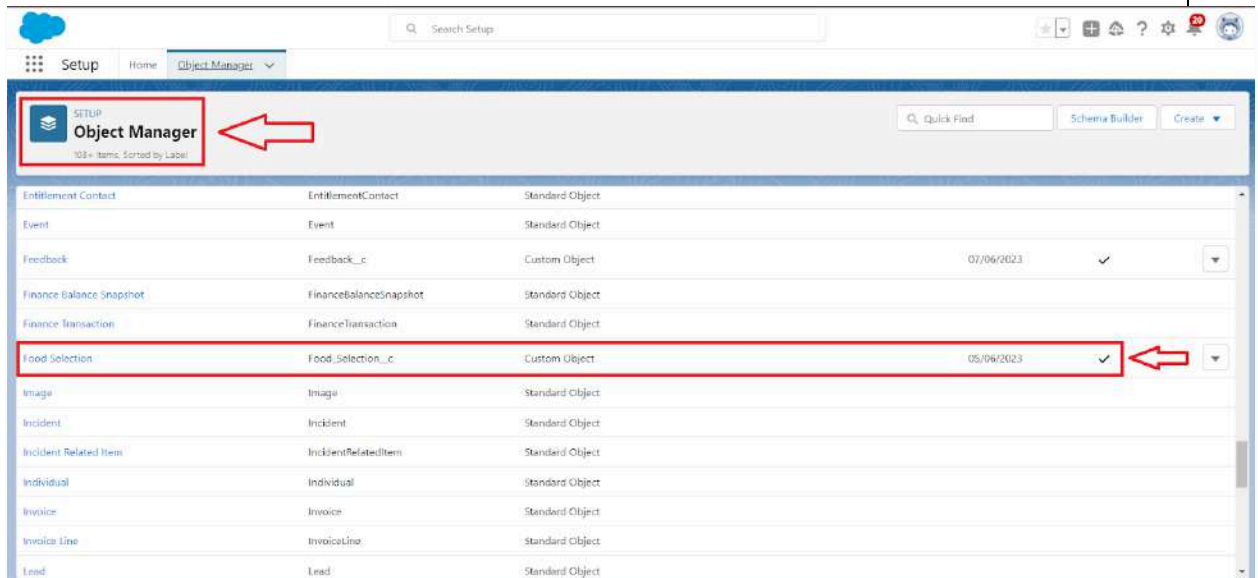
3. Create a another picklist Field for Food selection object

To create fields in an object :

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

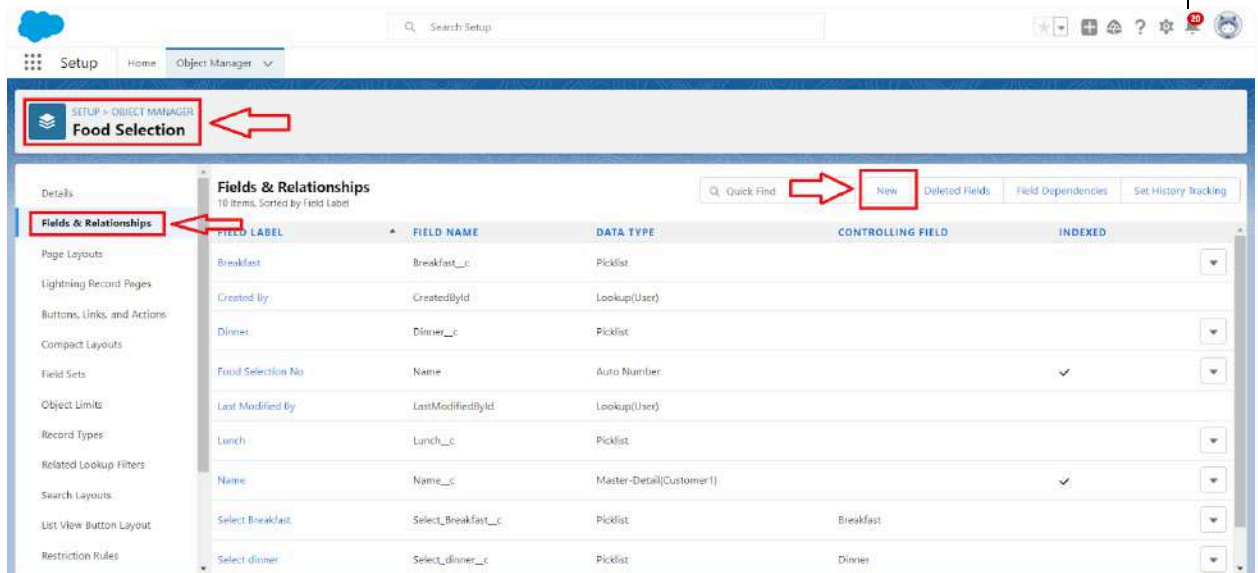
search bar > click on the object.

2.



3.

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



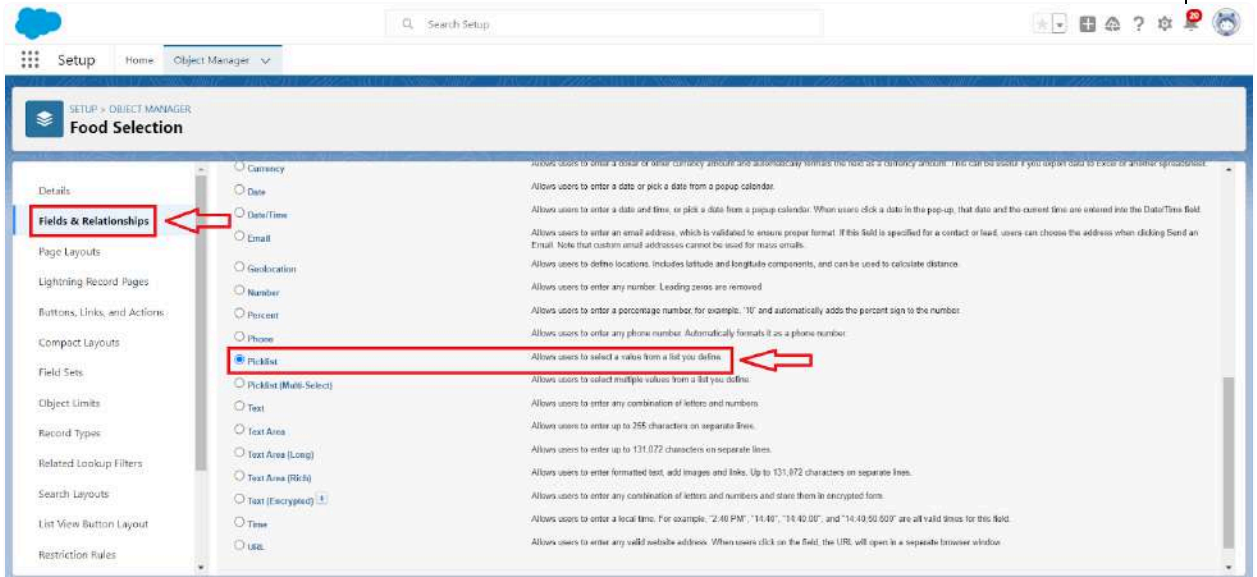
4.

5.

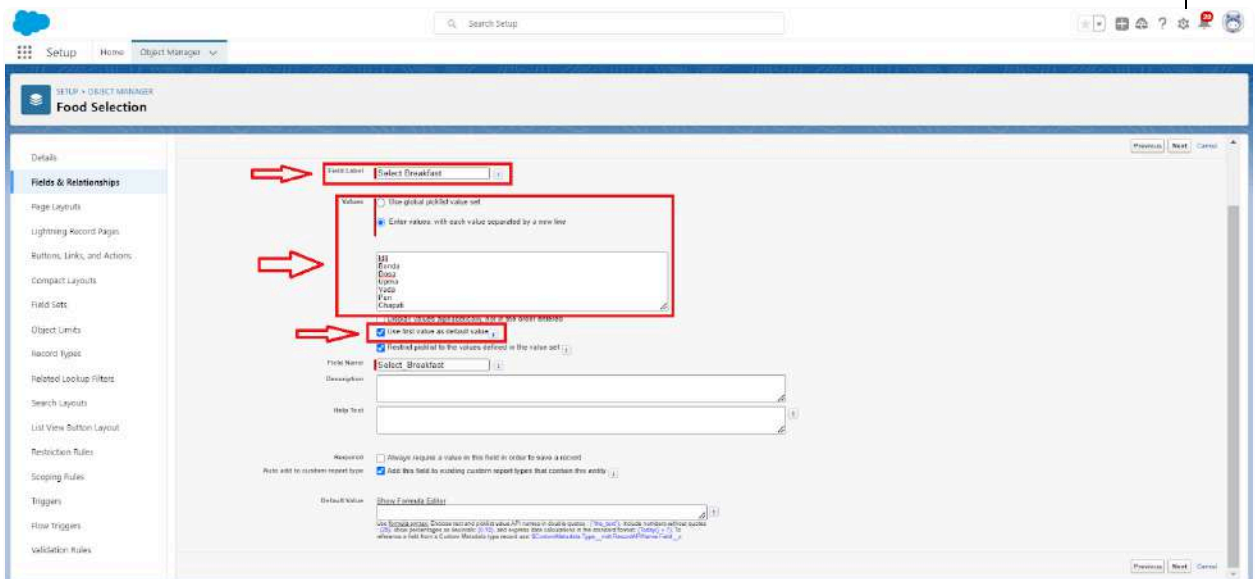
a. Select Data Type as a “Picklist”

6.

7.



8.



a. Fill the Above as following:

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

g. Chapati

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

9.

Field Dependency:

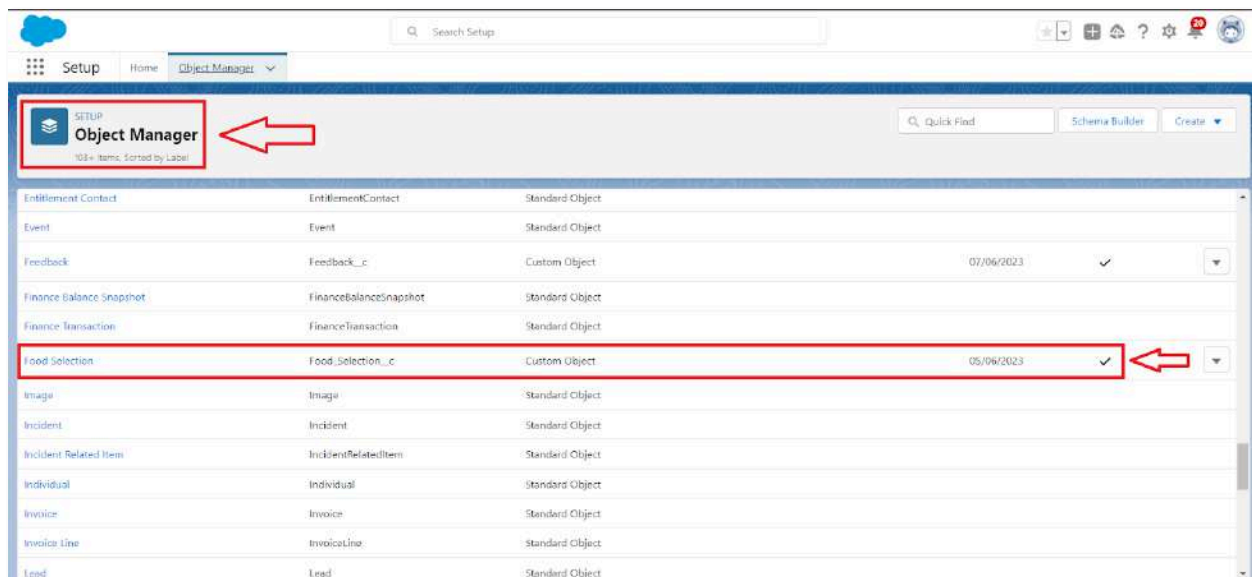
A field dependency refers to a relationship between two fields on an object where the values of one field determine the available values for another field. Field dependencies are commonly used to create picklist field relationships, where the available options in a dependent picklist are determined by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

Need to use Field Dependency:

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

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

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



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

Setup - OBJECT MANAGER
Food Selection

Details

Fields & Relationships (10 items, Sorted by Field Label)

Quick Find New **Field Dependencies** Set History Tracking

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

3. Now Click on New Option

Setup - OBJECT MANAGER
Food Selection

Details

Fields & Relationships

Food Selection Field Dependencies

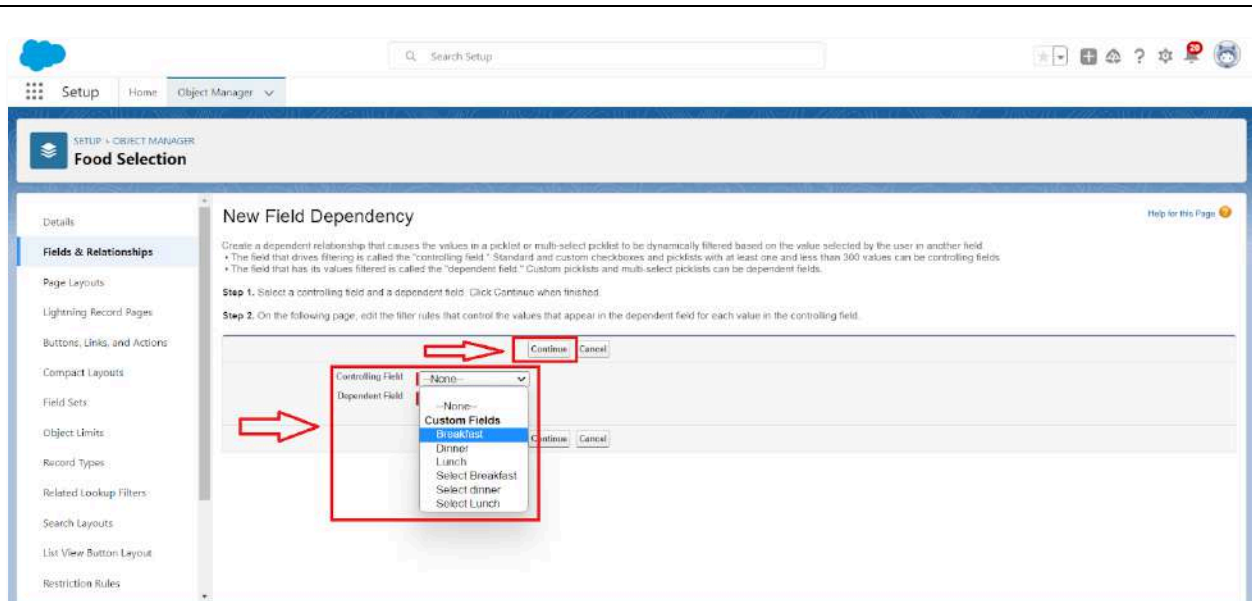
Back to Custom Object: Food Selection

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

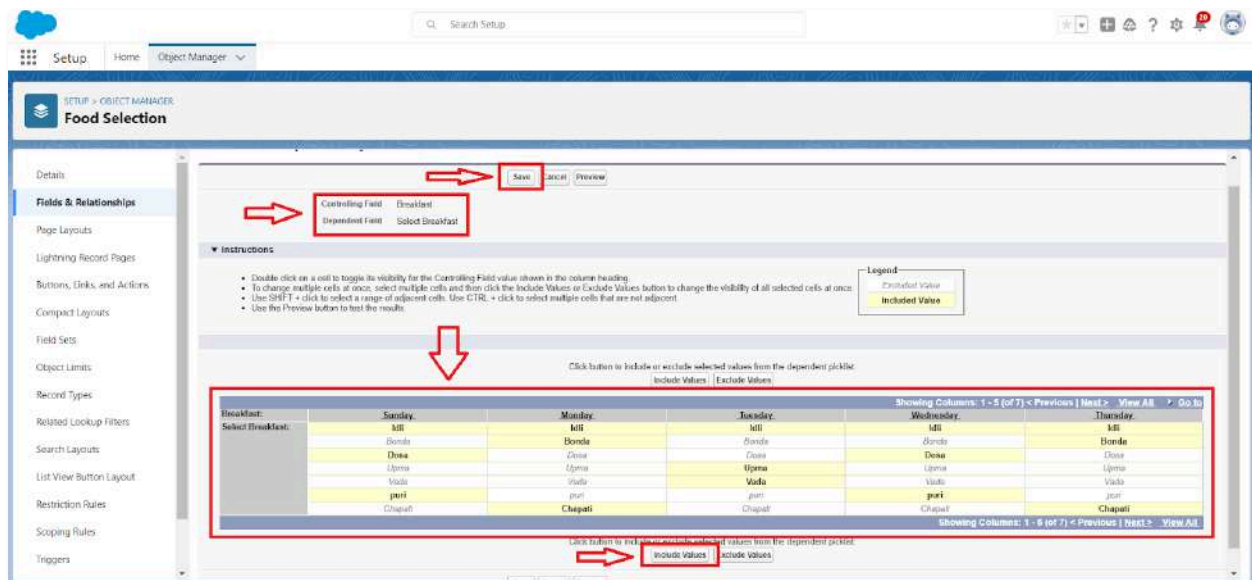
Field Dependencies New

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

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



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



4. To create fields in an object:

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

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

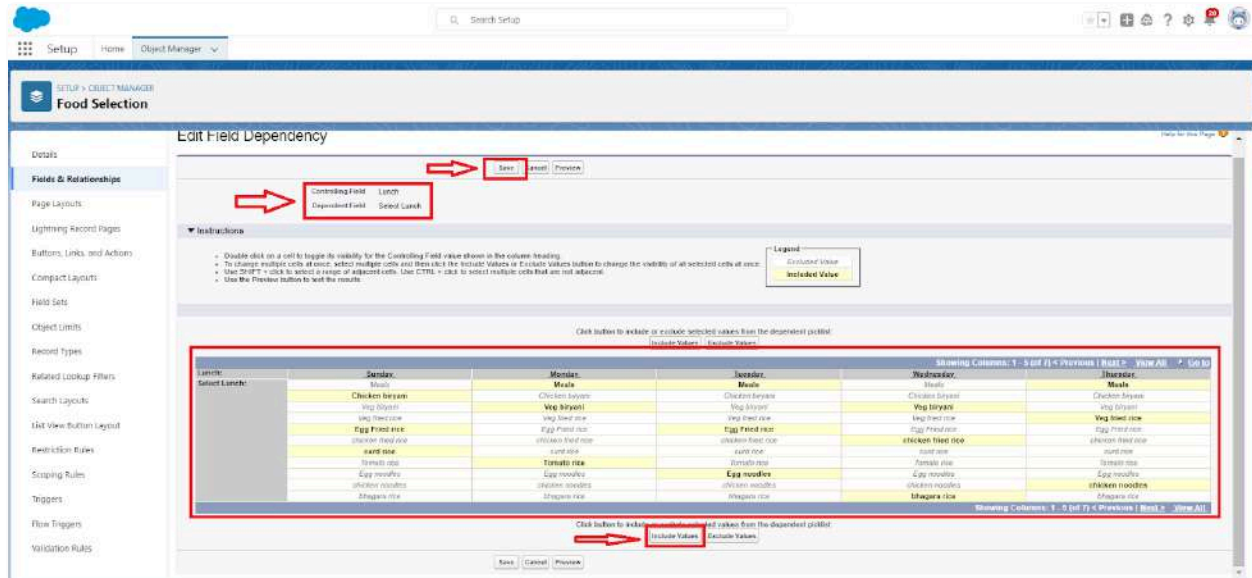
5. To create fields in an object:

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

To create a Field dependencies for Lunch and Select Lunch.

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now Click on fields & relationships and Click on Field Dependencies
3. Now Click on New Option
4. Under Controlling Field:Lunch, Dependent Field: Select Lunch and Click on Continue

- 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:

- Go to setup > click on Object Manager > type object name(Food Selection) 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: 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:

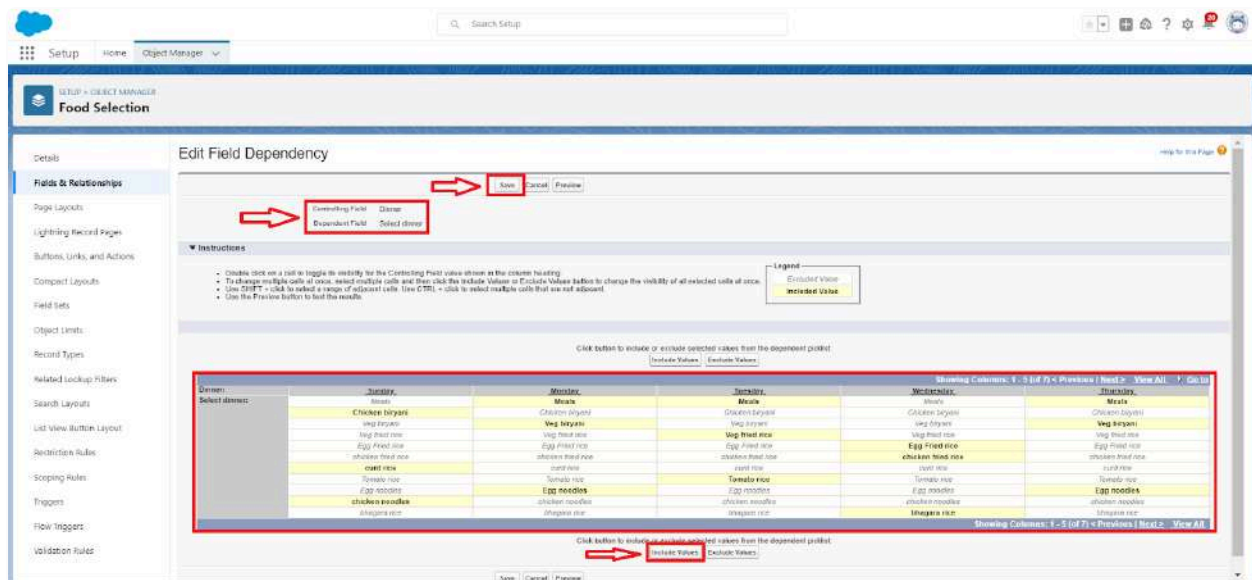
- Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
- Now click on "Fields & Relationships" > New
- Select Data Type as a "Picklist"

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.

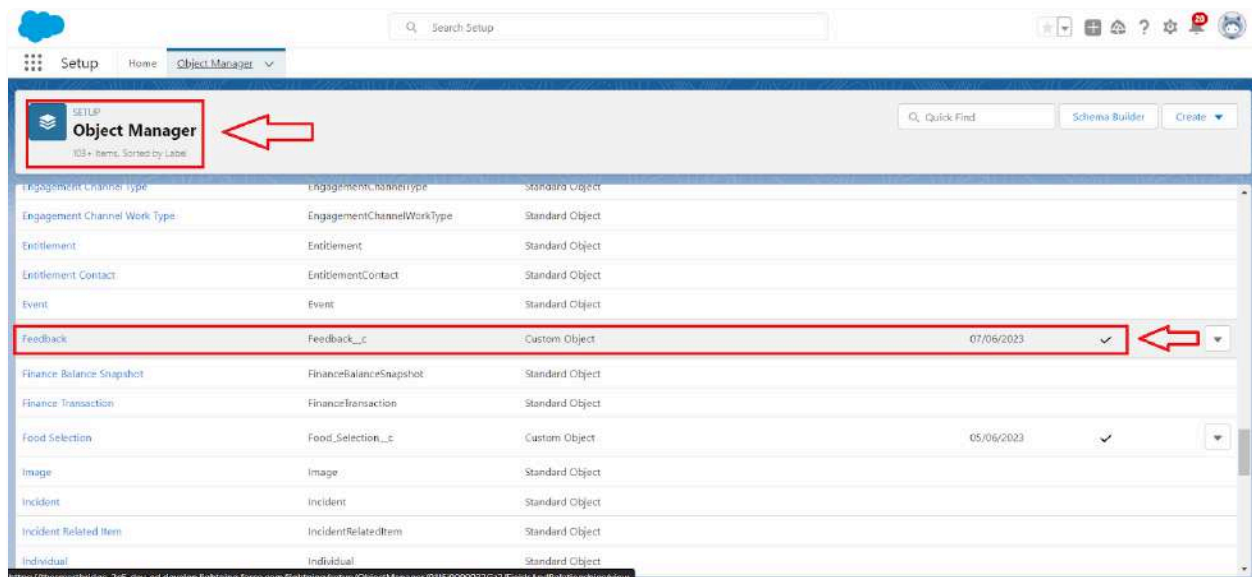


Activity 5:

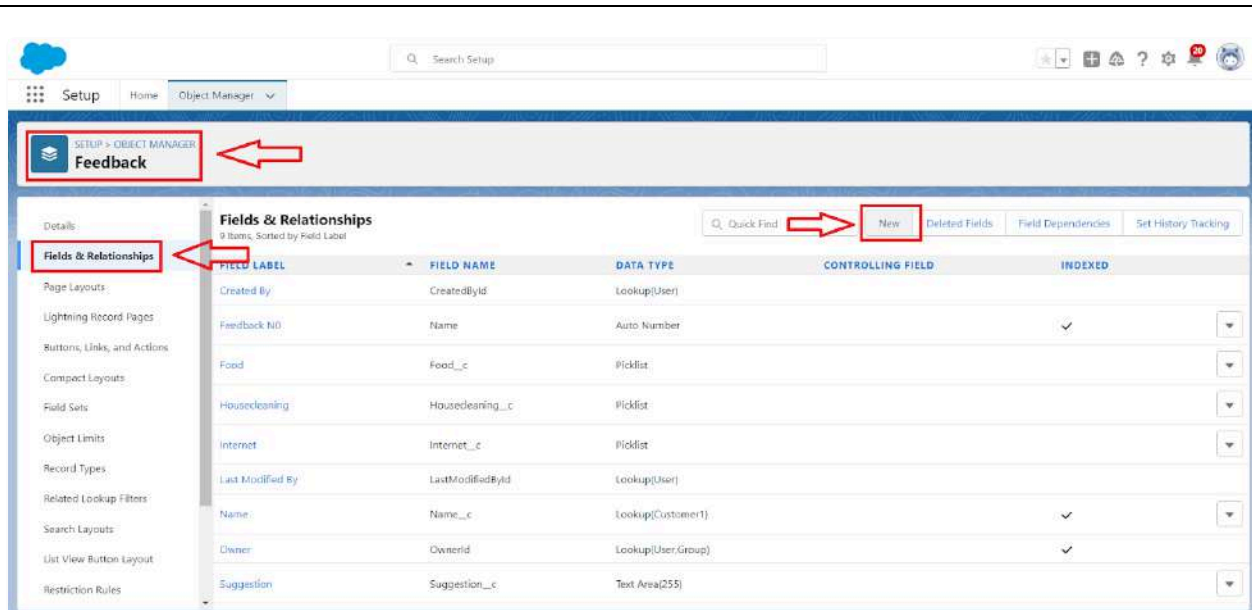
Creation of fields for the Feedback object

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.

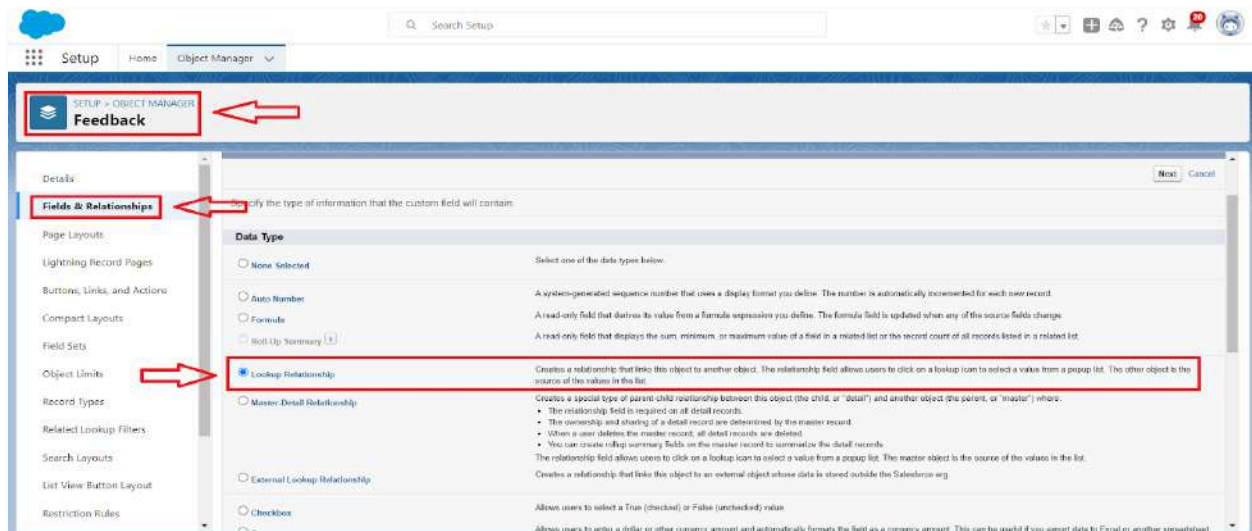


2. Now click on "Fields & Relationships" > New

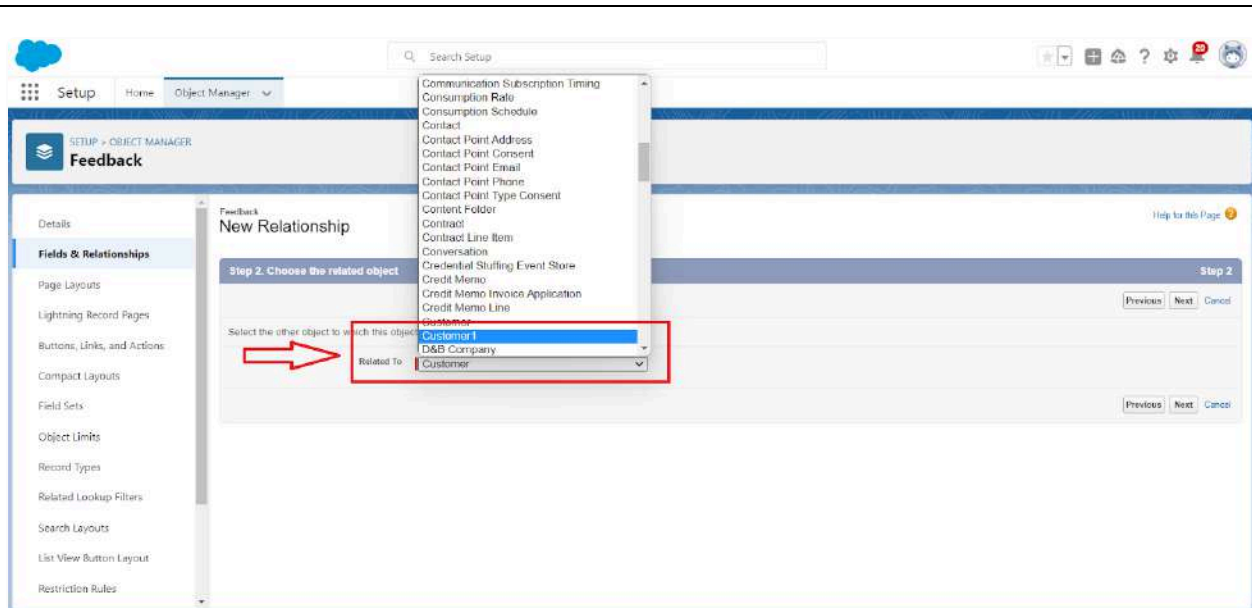


3. Select Data Type as a “Lookup Relationship”

4. Click on Next

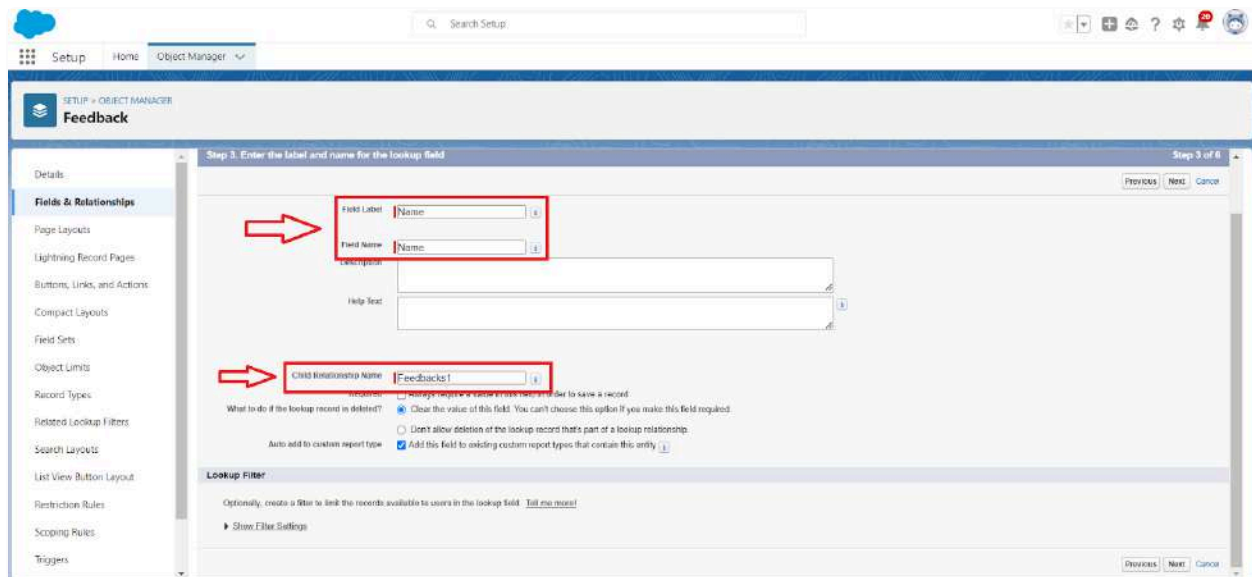


5. Click on the Related to drop down and Select the Customer1 object and click on Next



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.



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.

Setup Home Object Manager

Object Manager
103+ Items, Sorted by Label

Engagement Channel Type EngagementChannelType Standard Object

Engagement Channel Work Type EngagementChannelWorkType Standard Object

Entitlement Entitlement Standard Object

Entitlement Contact EntitlementContact Standard Object

Event Event Standard Object

Feedback Feedback__c Custom Object 07/06/2023 ✓

Finance Balance Snapshot FinanceBalanceSnapshot Standard Object

Finance Transaction FinanceTransaction Standard Object

Food Selection Food_Selection__c Custom Object 05/06/2023 ✓

Image Image Standard Object

Incident Incident Standard Object

Incident Related Item IncidentRelatedItem Standard Object

Individual Individual Standard Object

<https://testmarcbridge-2c6-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01150000032G02/FieldsAndRelationships/view>

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

Setup Home Object Manager

Feedback

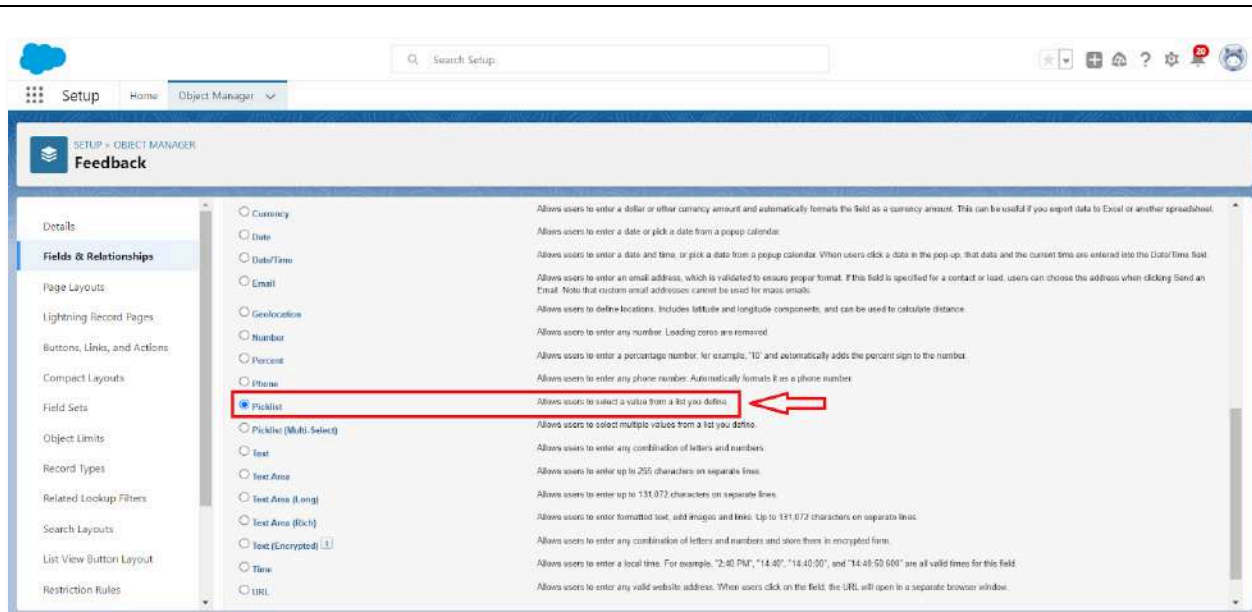
Details

Fields & Relationships
9 Items, Sorted by Field Label

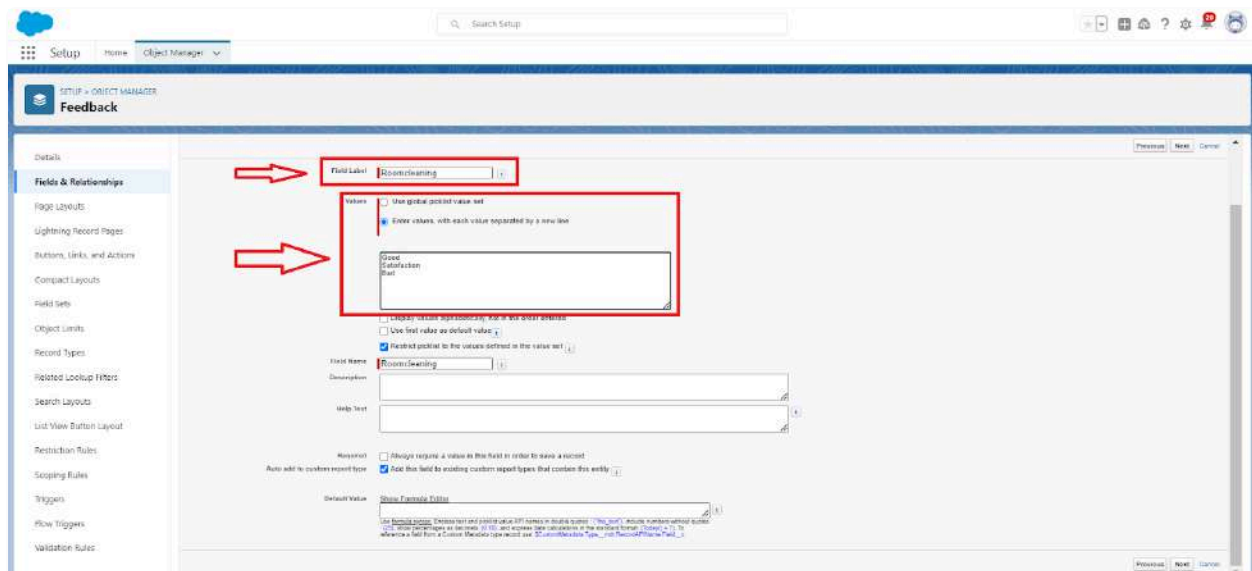
Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback ID	Name	Auto Number		✓
Food	Food__c	Picklist		
Housecleaning	Housecleaning__c	Picklist		
Internet	Internet__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name__c	Lookup(Customer1)		✓
Owner	OwnerId	Lookup(User.Group)		✓
Suggestion	Suggestion__c	Text Area(255)		

3. Select Data Type as a “Picklist”



4. Click on Next



5. Fill the Above as following:

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

3. To create a Another Fields in an Same Object

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

4. To create a Another Fields in an Same Object

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

5. To create a Another Fields in an Same Object

1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.
2. Now click on "Fields & Relationships" > New
3. Select Data Type as a "Text area"

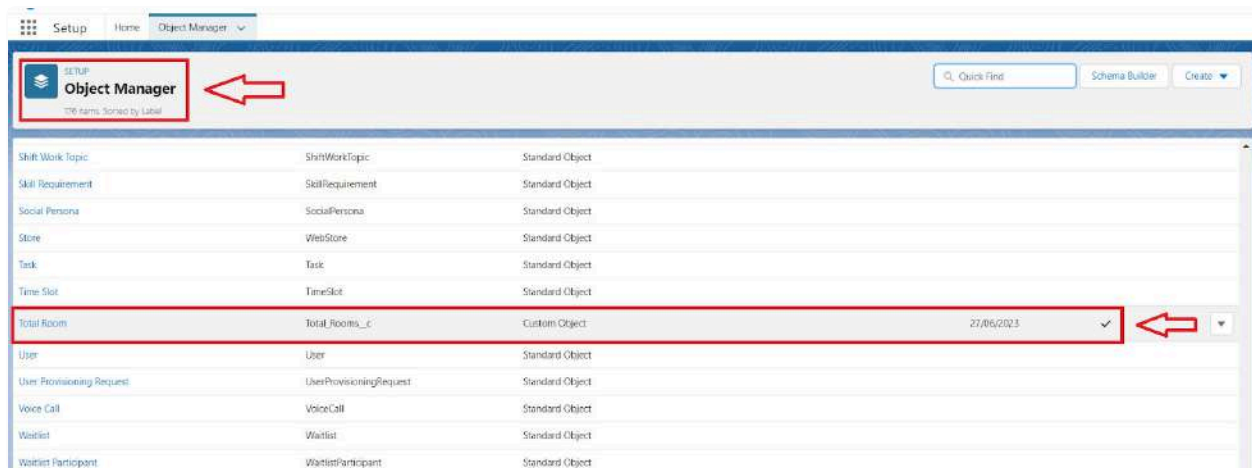
4. Click on Next
5. Fill the Above as following:
 - Field Label: Suggestion
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

Activity 6:

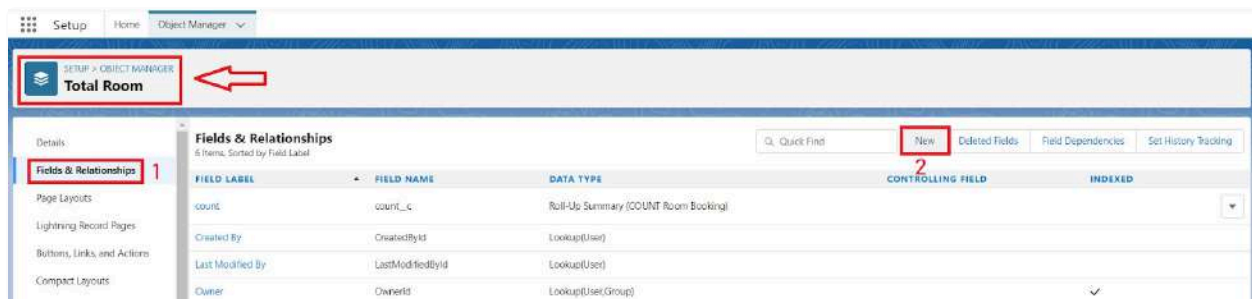
Creation of fields for the Total Rooms object

1. To create fields in an object:

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



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

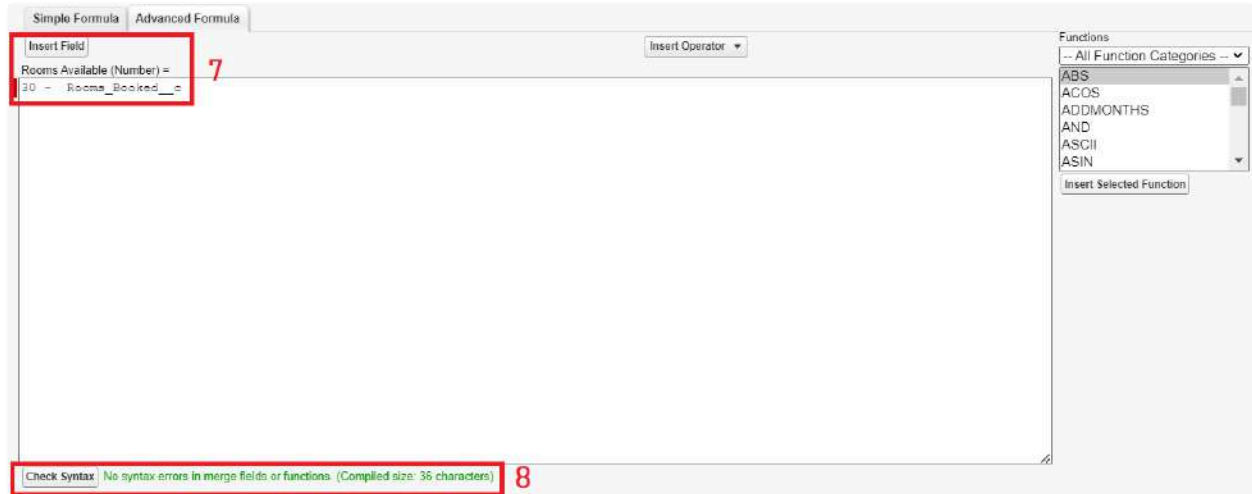


3. Select Data type as a “Formula” and Click on Next

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

Task 6:

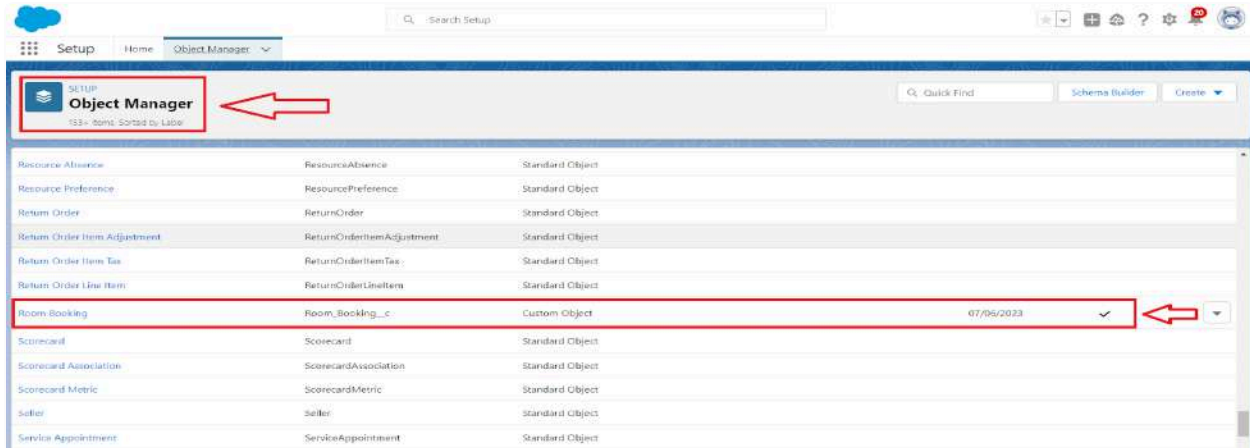
Validation rule

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.

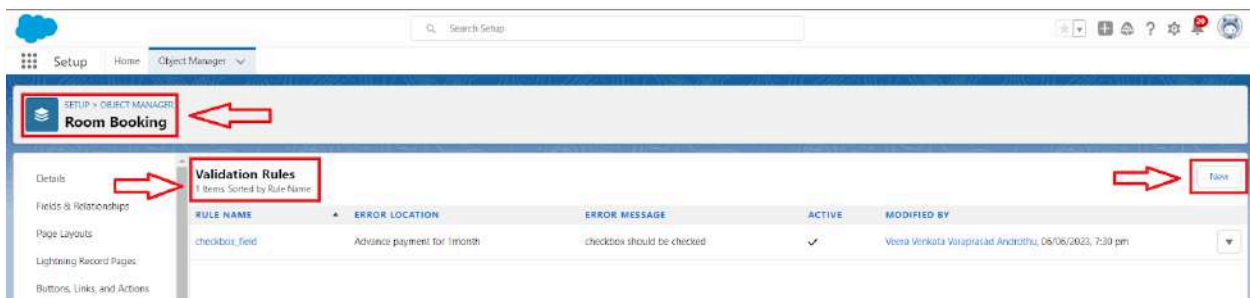
Activity 1:

create a validation rule to an Room Booking Object

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



2. Now click on "Validation rule" at top > New.

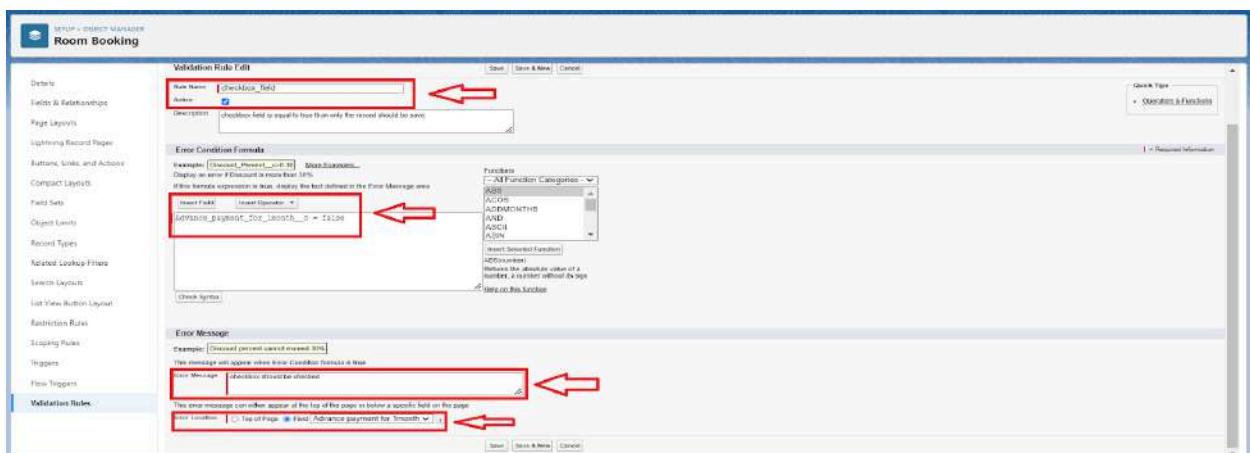


3. Enter Rule name "checkbox field" and make the validation should be Active.

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.

Activity 2:

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 "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 Validation Rule creation interface. The 'Rule Name' field is set to 'check_in_rule' and is marked as 'Active' (1). The 'Error Condition Formula' section shows the formula 'Check_in__c = False' (2). The 'Error Message' section shows the message 'Check box should be checked' (3). The 'Error Location' is set to 'Field: Check in' (4).

7. Click on save.

Task 7:

Profile: A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define

profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot delete standard ones

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

2. Custom Profiles:

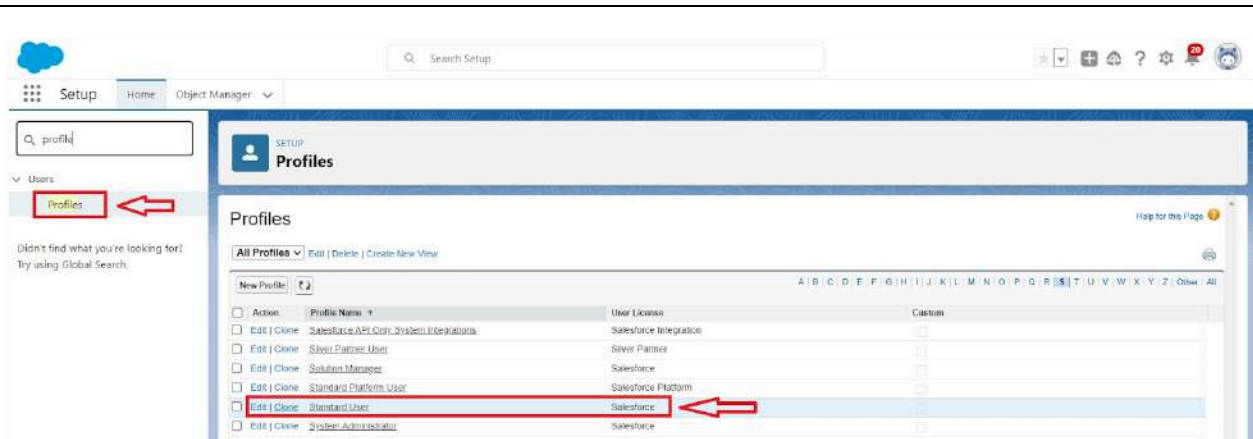
Custom ones defined by us.

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

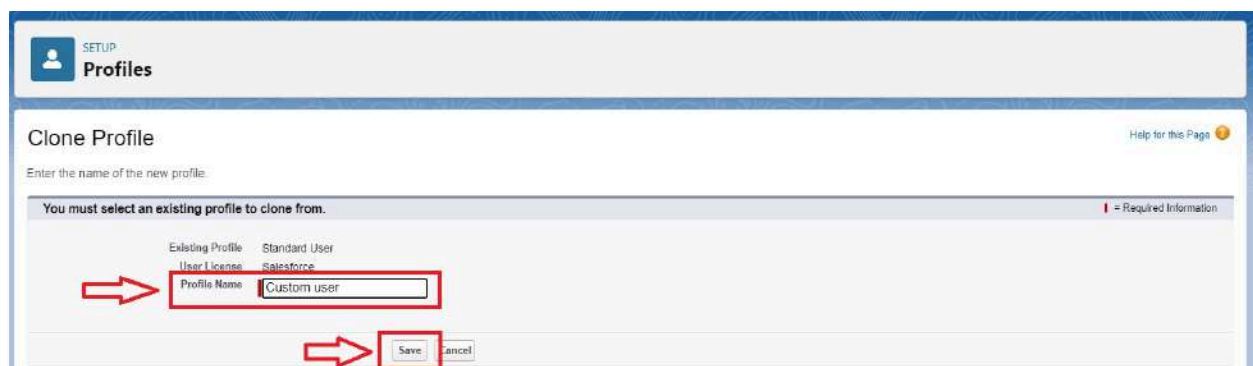
Activity 1: Custom user Profile

To create a new profile:

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



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



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

Basic Access

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

Data Administration

	Read	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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Room Bookings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Total Rooms	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings

Session Times Out After: 8 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

5. Scroll down and Click on Save.

Activity 2: Custom platform user1

To create a new profile:

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

Basic Access

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

Data Administration

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

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

5. Scroll down and Click on Save.

Activity 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.

Role 1 Permissions:

	Basic Access				Data Administration	
	Read	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"/>

Role 2 Permissions:

	Basic Access				Data Administration	
	Read	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"/>

Session Settings

Session Times Out After: 2 hours of inactivity

Session Security Level Required at Login: --None--

Password Policies

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets: ☐

Require a minimum 1 day password lifetime: ☐

5. Scroll down and Click on Save.

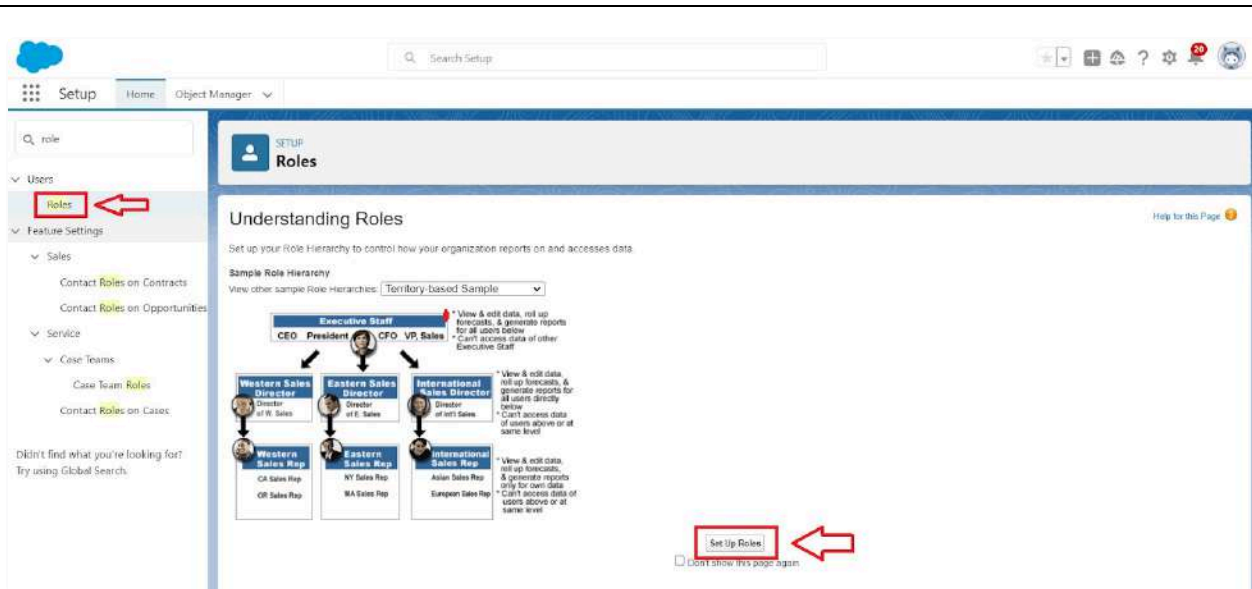
Task 8:

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

Activity 1:

Marketing Role

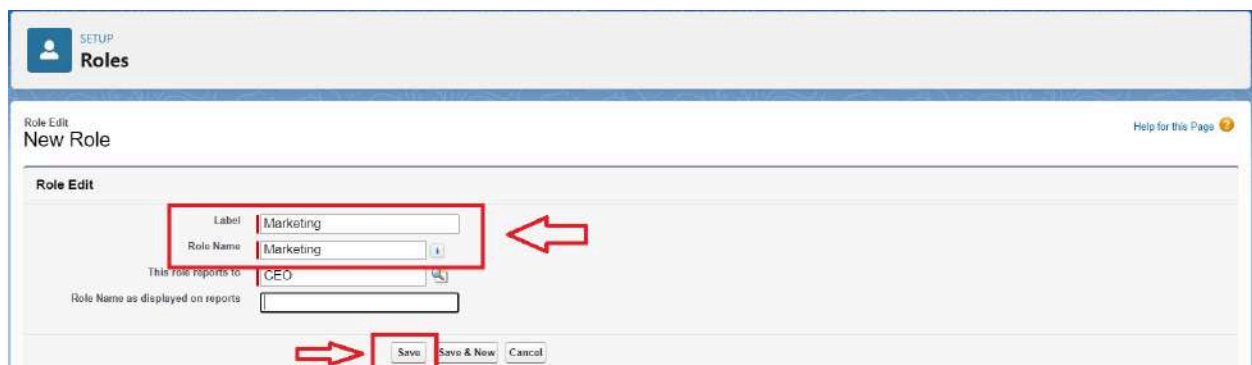
1. Go to quick find > Search for Roles > click on set up roles.



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



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

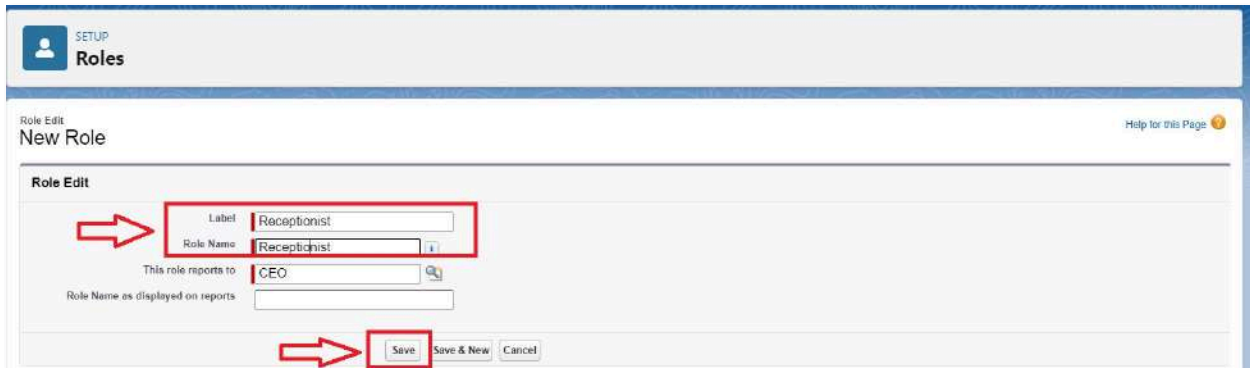


4. Then click on Save.

Activity 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.



The screenshot shows the 'Role Edit' page in Salesforce. The page title is 'New Role'. The 'Role Edit' section contains the following fields:

- Label:** Receptionist
- Role Name:** Receptionist
- This role reports to:** CEO
- Role Name as displayed on reports:** (empty)

At the bottom of the form, there are three buttons: 'Save', 'Save & New', and 'Cancel'. A red arrow points to the 'Save' button.

4. Then click on Save.

Task 9:

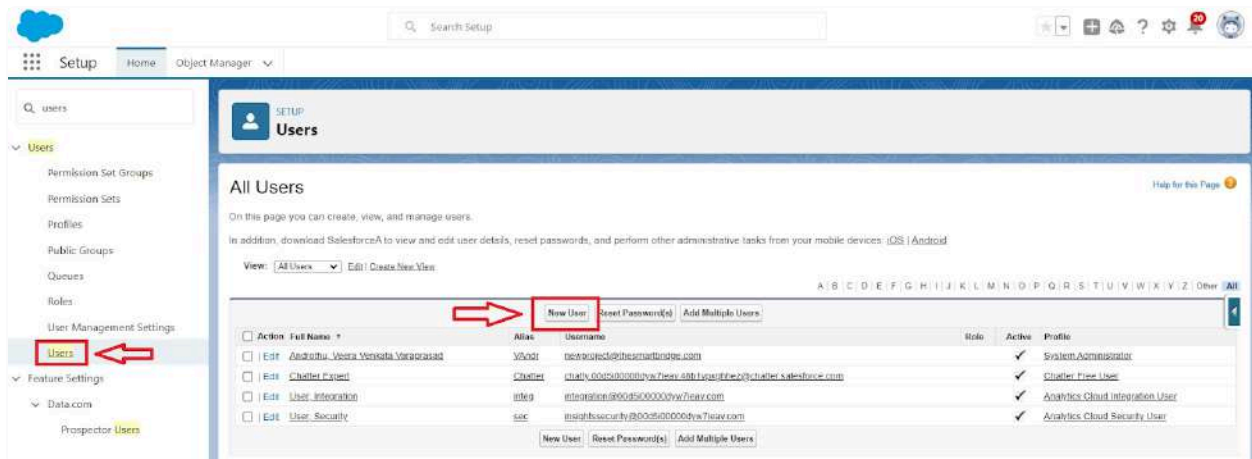
Users

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

Activity 1:

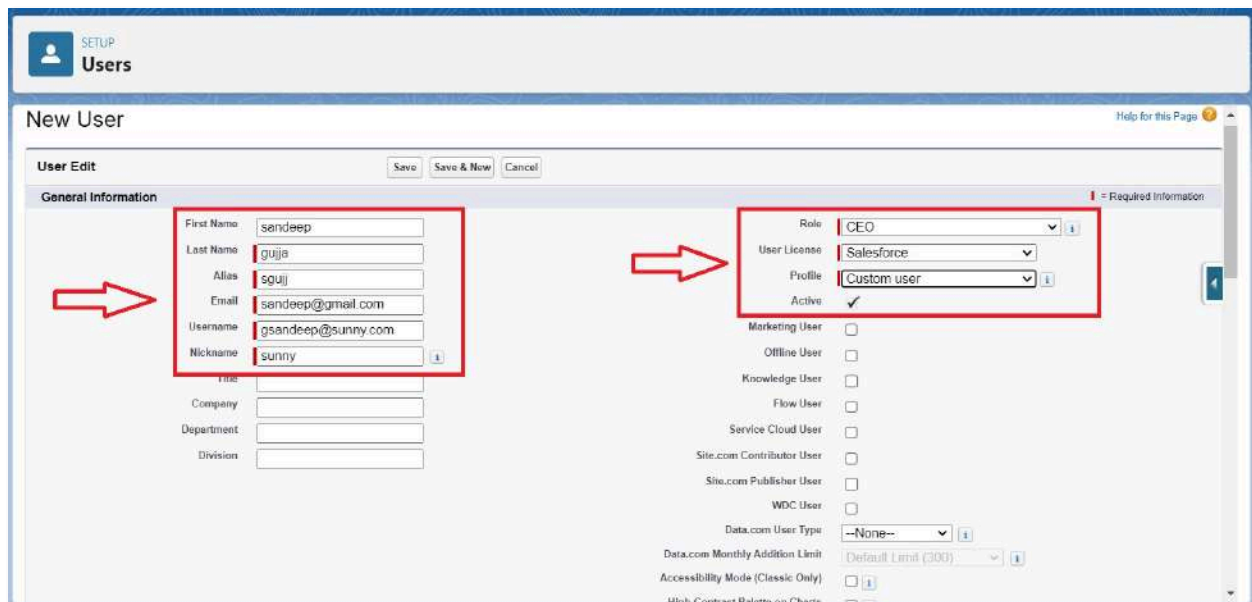
Create User

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



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



Activity 2: Create Another User

1. Go to setup > type users in quick find box > select users > click New user.
2. Fill in the fields
 - First Name : Abhilash
 - Last Name : garapati
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.com
 - Nick Name : Give a Nickname
 - Role : Marketing
 - User licence: Salesforce platform
 - Profiles : Custom Platform User1

The screenshot shows the Salesforce 'User Edit' interface. At the top, there's a 'SETUP Users' header. Below it, the user's name 'abhilash garapati' is displayed. A 'User Edit' section contains 'Save', 'Save & New', and 'Cancel' buttons. The 'General Information' section includes fields for First Name (Abhilash), Last Name (garapati), Alias (agara), Email (abhi@gmail.com), Username (gabhi@tech.com), and Nickname (abhi). To the right, the 'Role' is set to 'Marketing', 'User License' is 'Salesforce Platform', and 'Profile' is 'Customer Platform user1'. The 'Active' checkbox is checked. Below these are various user types like 'Marketing User', 'Offline User', etc., each with a checkbox. At the bottom, there are fields for 'Data.com User Type' (set to '--None--') and 'Data.com Monthly Addition Limit' (set to 300). A red arrow points to the 'Save' button, and another red arrow points to the 'Role' dropdown.

3. save

Activity 3:

Create Another User

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

- First Name : Ganesh
- Last Name : gelli
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.com
- Nick Name: Give a Nickname
- Role : Receptionist
- User licence: Salesforce Platform
- Profiles : Custom Platform user2

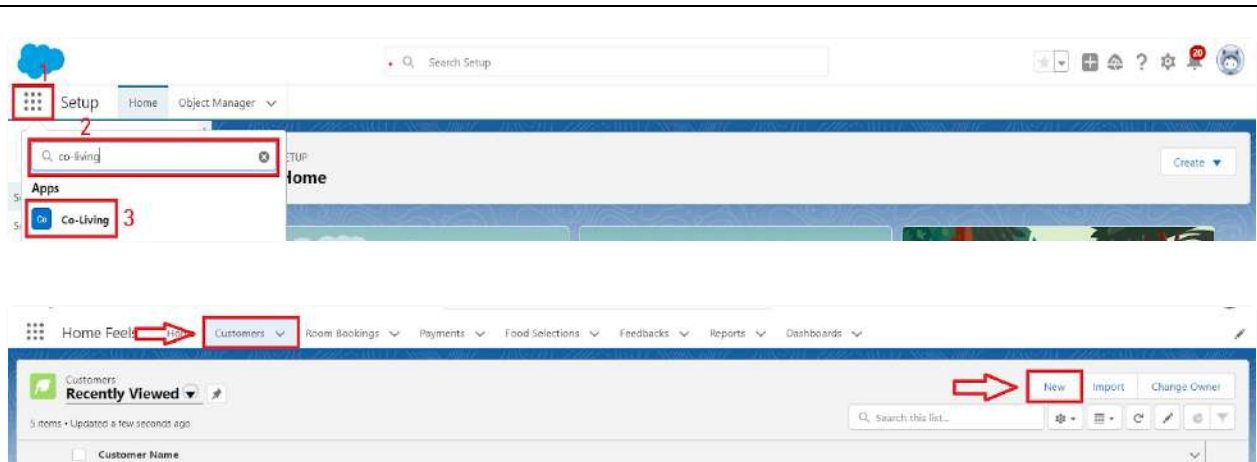
3. Save

Task 10: User Adoption

Activity 1:

Create a Record (Customers)

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



3. Click on the Customers Tab.

New Customer1

* = Required Information

Information

*Customer Name ↶

*Phone no ↶

Email id ↶

Owner ↶
 Veera Venkata Varaprasad Androthu

*Permanent Address ↶

*current Status ↶

↶

4. Click new and fill details & Save

Activity 2:

View a Record (Customers)

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

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

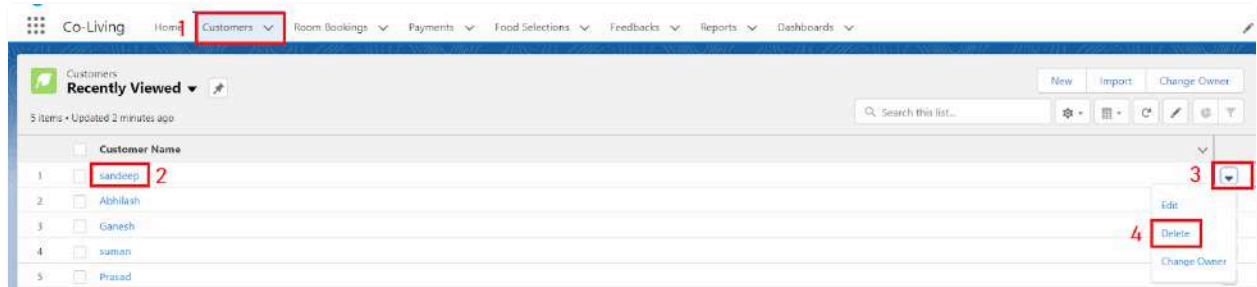
The screenshot shows the Co-Living app interface. At the top, there's a navigation bar with 'Co-Living' and a dropdown menu for 'Customers'. Below this, a 'Recently Viewed' section shows a list of customers, with 'sandeep' highlighted. A red arrow points to the 'sandeep' record. Below the list, the 'Details' tab is selected, showing customer information. A red box highlights the details section.

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

Activity 3:

Delete a Record (Customers)

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



Task 11:

Reports

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

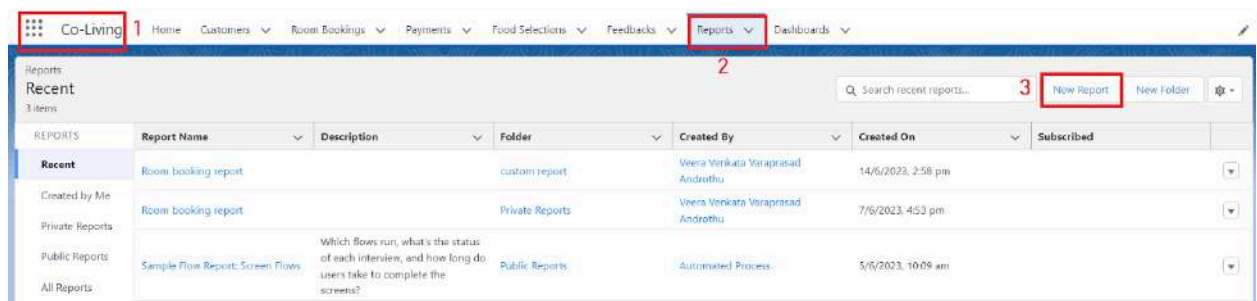
Types of Reports in Salesforce

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

Activity 1:

Create Report

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



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.

Create Report

Category

Recently Used

All 1

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Select a Report Type

customers 2

Report Type Name	Category
Activities with Customers	Standard
Customers	Standard
Customers with Room Bookings and Total Rooms	Standard
Customers with Payments	Standard
Customers with Payments and Room Booking	Standard
Customers with Food Selections	Standard
Total Rooms with Room Bookings and Customers	Standard
Customers with Room Bookings with Total Rooms	Custom
Customers with Room Bookings with Payments	Custom

3 4

4. Customize your report

5. Add fields from left pane as shown below

REPORT Room booking report Customers with Room Bookings with Payments

Save Close Run

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Outline

Groups

Add group...

Customer Name

GROUP COLUMNS

Add group...

Columns

Add column...

Room No

Phone no

Email id

Permanent Address

current Status

Room sharing

Advance payment for 1 month

AC - 3000

Amount

Customer Name	Room No	Phone no	Email id	Permanent Address	current Status	Room sharing	Advance payment for 1 month	AC - 3000	Amount
Subtotal									
Ganesh	RM-006	7500755535	alpha@gmail.com	Chandkavaram	Employee	single sharing - 14000	1	0	₹38,000
Subtotal									
Prasad	RM-005	868275423	ganesh@gmail.com	Tadiparu	Student	Triple sharing - 10000	1	0	₹20,000
Subtotal									
Prasad	RM-001	9494724352	vinapracandirothu@gmail.com	Tadiparu	Employee	single sharing - 14000	1	1	₹14,000
Subtotal									
sandeep	RM-007	970526532	sandeep@gmail.com	Hyderabad	Employee	Triple sharing - 10000	1	0	₹20,000
Subtotal									
sandeep	RM-003	970526532	sandeep@gmail.com	Hyderabad	Employee	Double sharing - 12000	2	0	₹24,000
Subtotal									
suman	RM-004	870687262	suman@gmail.com	Ichapuram	Employee	Double sharing - 12000	2	1	₹10,000
Subtotal									
Total						6	2		₹1,16,000

Row Counts Detail Rows Subtotals Grand Total

Save or run it.

Activity 2:

Create another Report

1. Go to the app > click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel

Select customer with Room booking with Payments ? click on start report.

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

Task 12:

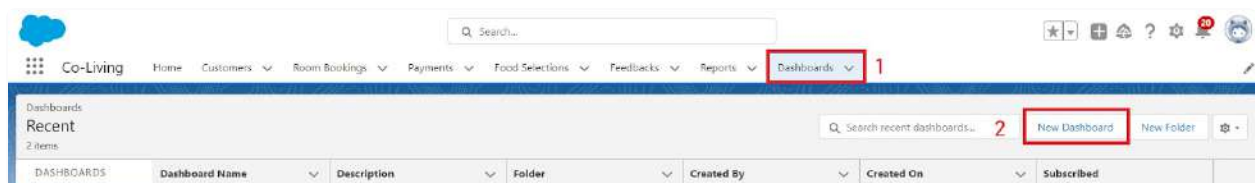
Dashboards

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

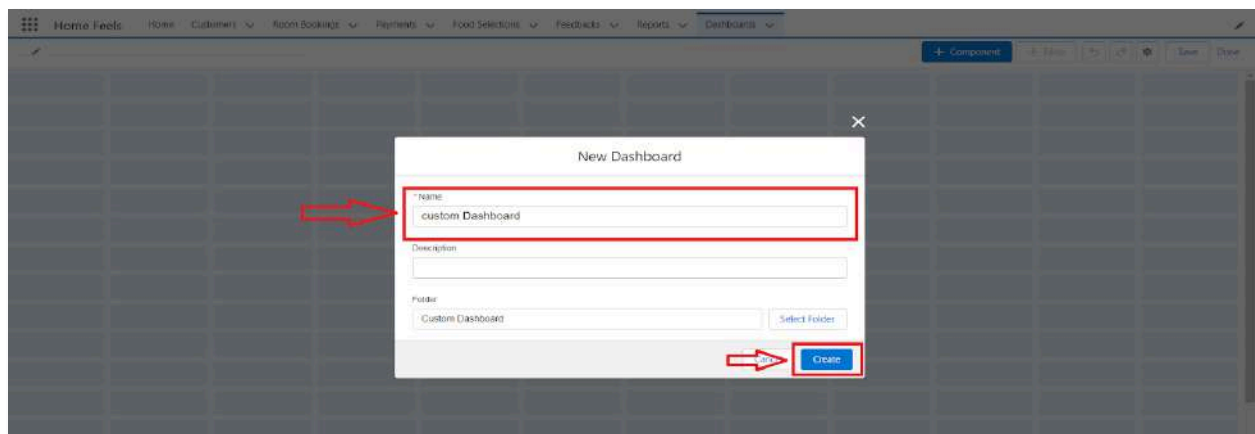
Activity 1:

Create Dashboard

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

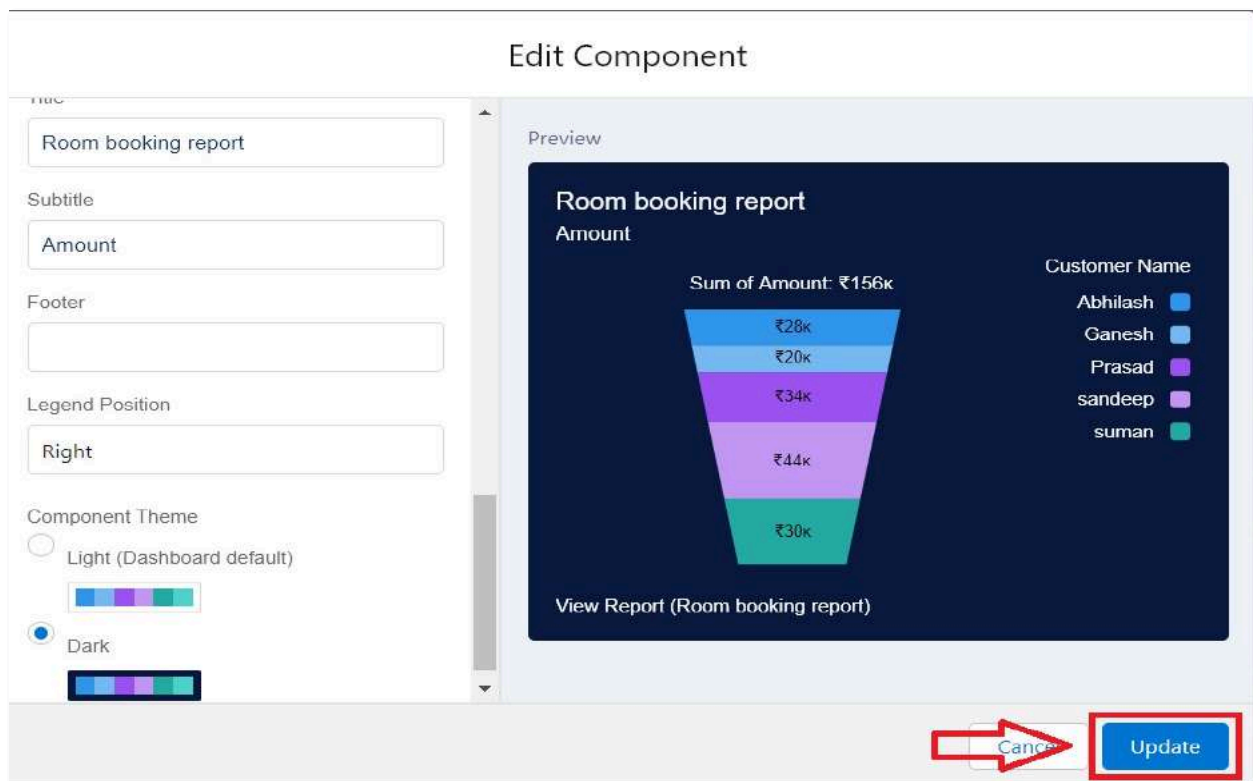
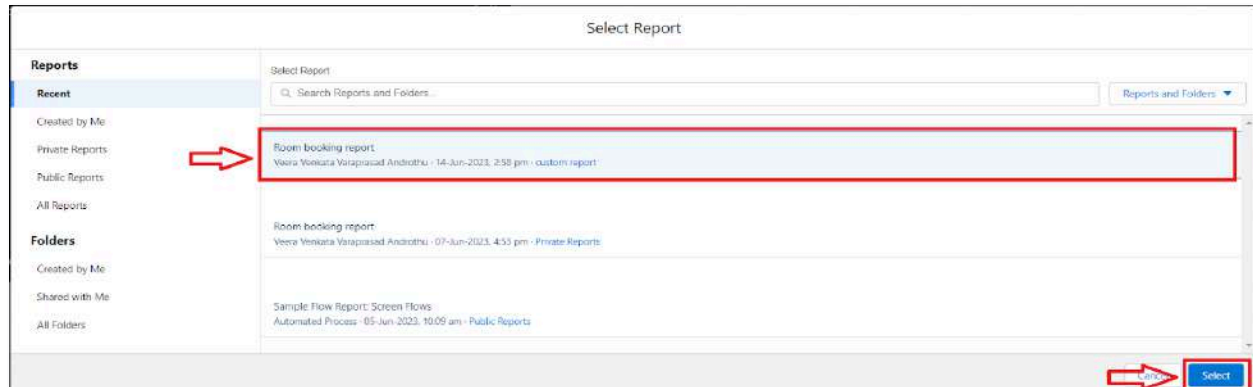


2. Give a Name and click on Create.



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.

Activity 2:

Create Another Dashboard

1. Go to the app > click on the Dashboard tabs and click on new Dashboard.
2. Give a Name and click on Create.
3. Select add component.

4. Select a Report Customer with Room Booking with Payments and click on select.
5. Click Add then click on Save and then click on Done.

Task 13:

Flows

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

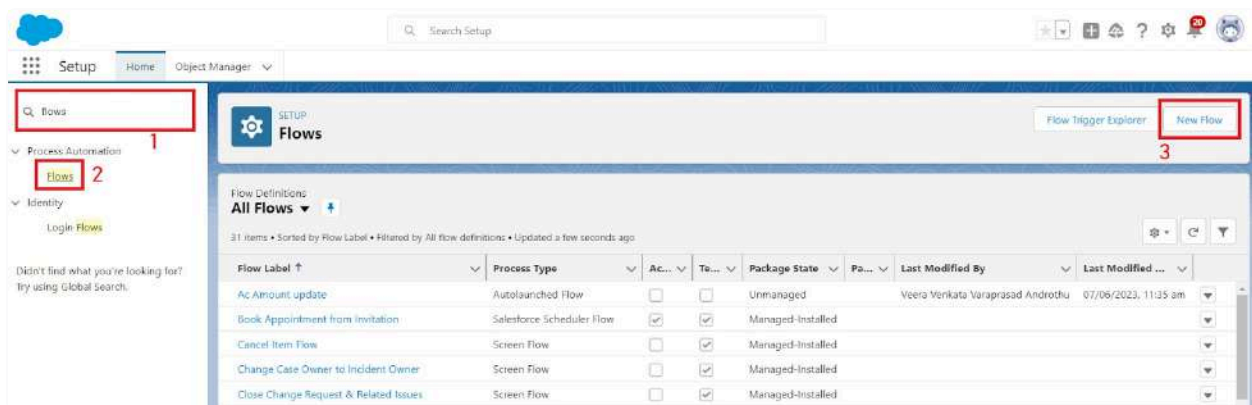
Why do we need to create a flow:

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

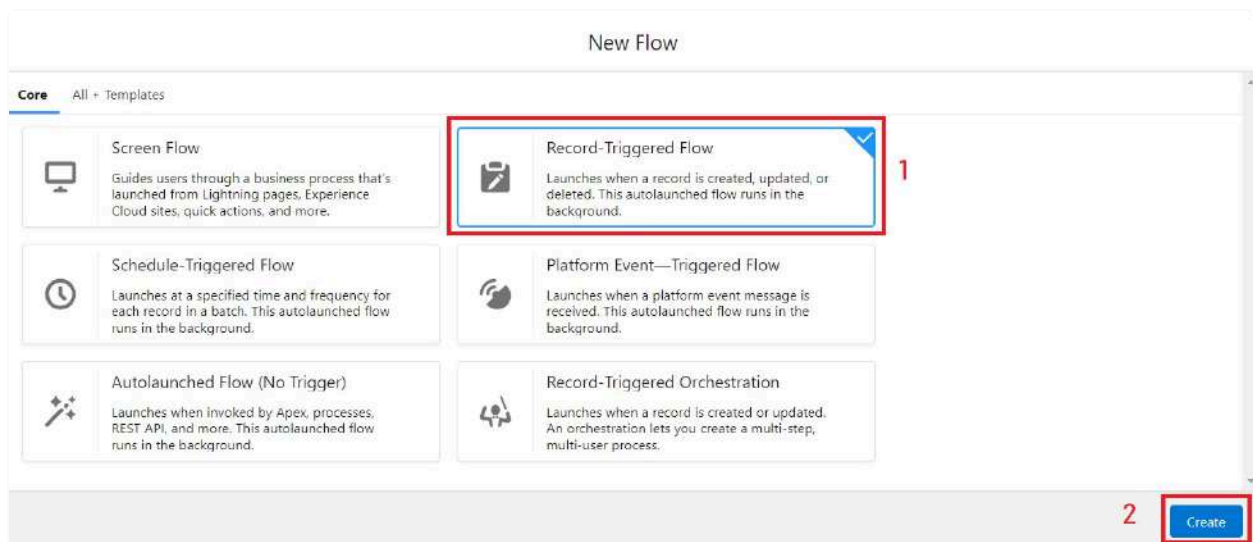
Activity 1:

Create a Flow

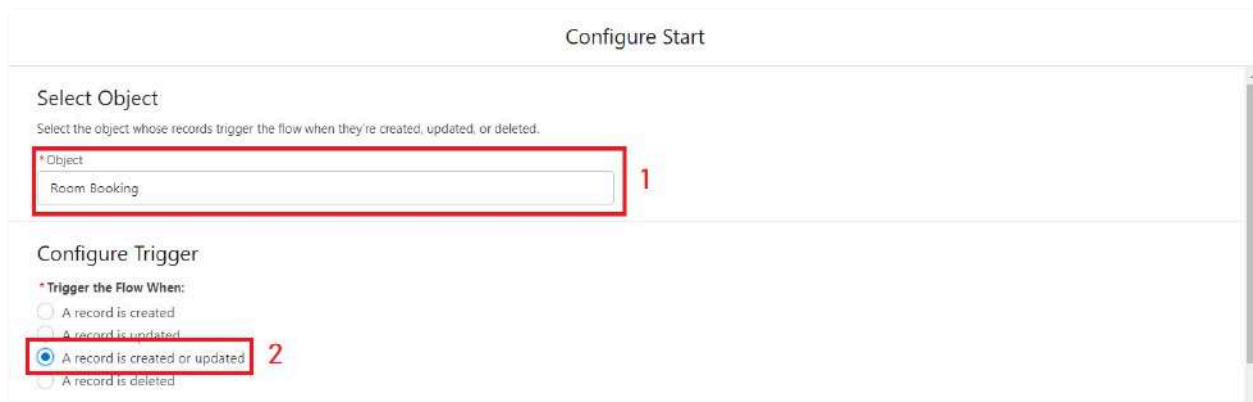
1. Go to setup > type Flow in quick find box > Click on the Flow and Select the New Flow.



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.



Set Entry Conditions

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

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

Condition Requirements:

None

* Optimize the Flow for:

Fast Field Updates

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

Actions and Related Records

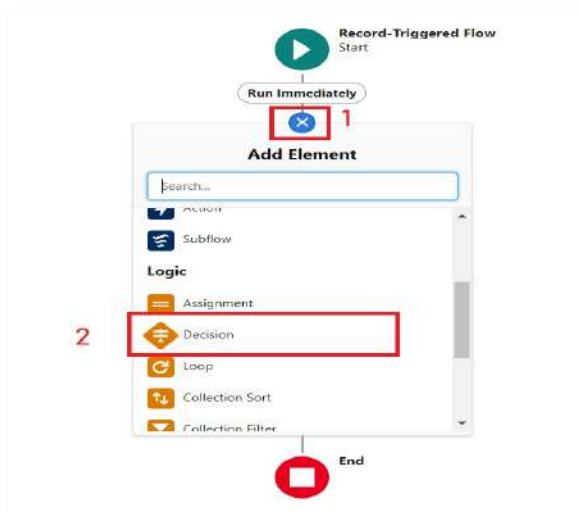
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

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

Cancel

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.
- Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Single sharing.
 - Click on "Add Condition"
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.

- Value: Select False.
- Click on “+” Symbol In the Outcome Order.

New Decision

*Label
Field Should be Update

*API Name
Field_Should_be_Update

Description 1

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

OUTCOME ORDER 1 +

Single Sharing 4

*Label
Single Sharing

*Outcome API Name
Single_Sharing

Condition Requirements to Execute Outcome
All Conditions Are Met (AND) 3

Resource
\$Record > Room sharing X

Operator
Equals

Value
single sharing

Resource
AND \$Record > AC - 3000 X

Operator
Equals

Value
False X

+ Add Condition

Cancel Done

9. Enter the Outcome Details Label: Double sharing, Outcome API name: Gets Automatically Generated.

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

OUTCOME ORDER 1 + 3

Single Sharing

Double sharing

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 X

Operator
Equals

Value
Double sharing

Resource
AND \$Record > AC - 3000 X

Operator
Equals

Value
False X

+ Add Condition

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.

The screenshot shows the 'OUTCOME DETAILS' form. On the left, the 'OUTCOME ORDER' list contains 'Single Sharing', 'Double sharing', and 'Triple Sharing'. The 'Triple Sharing' item is highlighted with a red box and a red '3'. The main form area is titled 'OUTCOME DETAILS' with a red '1' next to it. It contains a 'Label' field with 'Triple Sharing' and an '* Outcome API Name' field with 'Triple_Sharing'. Below these is a 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)'. A red '2' is next to the condition list. The condition list contains two items: 'Resource: \$Record > Room sharing' with 'Operator: Equals' and 'Value: Triple sharing', and 'AND Resource: \$Record > AC - 3000' with 'Operator: Equals' and 'Value: False'. Both condition items are highlighted with a red box. A 'Delete Outcome' button is in the top right corner.

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

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

The screenshot shows the 'OUTCOME ORDER' list on the left with a '+' button highlighted by a red box and the number '3'. The 'OUTCOME DETAILS' form is open for 'Single Ac', with its label and API name fields highlighted by a red box and the number '1'. The 'Condition Requirements to Execute Outcome' dropdown is set to 'All Conditions Are Met (AND)' and is highlighted by a red box and the number '2'. Below this, there are two condition rows. The first row has 'Resource' as '\$Record > Room sharing', 'Operator' as 'Equals', and 'Value' as 'single sharing'. The second row has 'Resource' as '\$Record > AC - 3000', 'Operator' as 'Equals', and 'Value' as '(!\$GlobalConstant.True)'. A 'Delete Outcome' button is visible in the top right corner.

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

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

The screenshot shows the 'OUTCOME ORDER' list on the left with a '+' button highlighted by a red box and the number '3'. The 'OUTCOME DETAILS' form is open for 'Double Ac', with its label and API name fields highlighted by a red box and the number '1'. The 'Condition Requirements to Execute Outcome' dropdown is set to 'All Conditions Are Met (AND)' and is highlighted by a red box and the number '2'. Below this, there are two condition rows. The first row has 'Resource' as '\$Record > Room sharing', 'Operator' as 'Equals', and 'Value' as 'Double sharing'. The second row has 'Resource' as '\$Record > AC - 3000', 'Operator' as 'Equals', and 'Value' as '(!\$GlobalConstant.True)'. A 'Delete Outcome' button is visible in the top right corner.

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

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

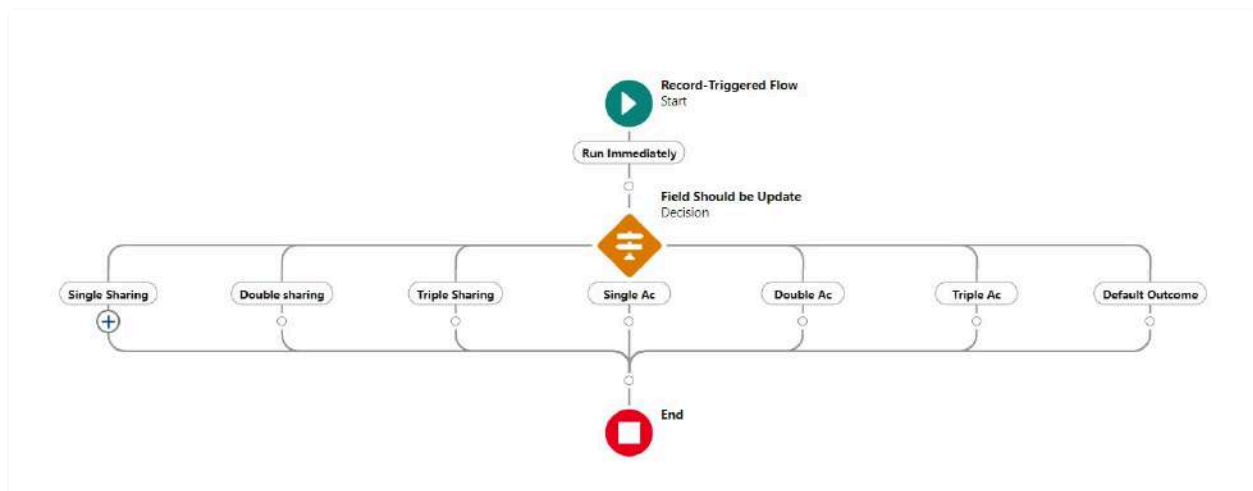
- Value: Select True.
- Click on Done.

New Decision

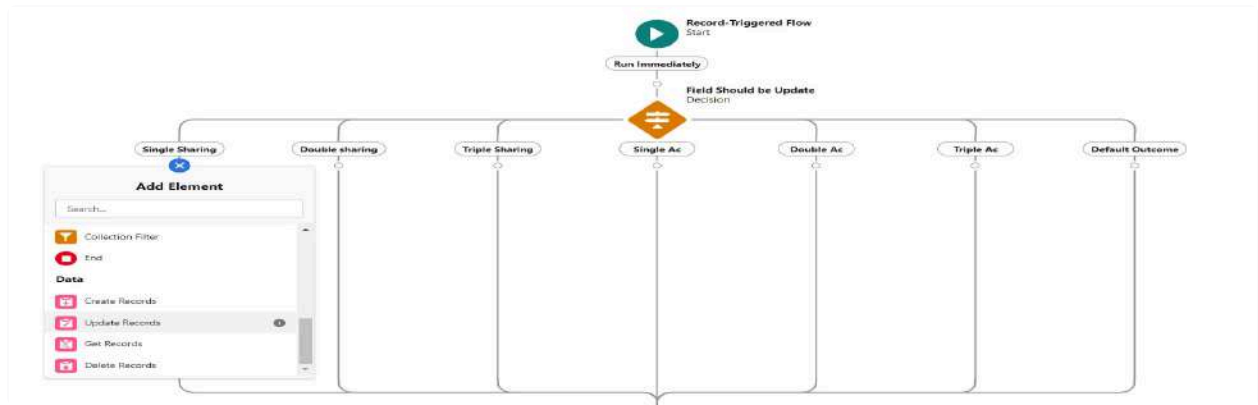
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER	OUTCOME DETAILS									
1	<div> <div> * Label Triple Ac </div> <div> * Outcome API Name Triple_Ac </div> </div> <div> Condition Requirements to Execute Outcome All Conditions Are Met (AND) </div> <div> <table border="1"> <thead> <tr> <th>Resource</th> <th>Operator</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td>\$Record > Room sharing</td> <td>Equals</td> <td>Triple sharing</td> </tr> <tr> <td>AND \$Record > AC - 3000</td> <td>Equals</td> <td>True</td> </tr> </tbody> </table> </div> <div> When to Execute Outcome <input checked="" type="radio"/> If the condition requirements are met <input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements </div>	Resource	Operator	Value	\$Record > Room sharing	Equals	Triple sharing	AND \$Record > AC - 3000	Equals	True
Resource	Operator	Value								
\$Record > Room sharing	Equals	Triple sharing								
AND \$Record > AC - 3000	Equals	True								

Cancel Done



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



15. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label

single

* API Name

single

Description

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount_c

Value

← 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.

Edit Update Records

Update Salesforce records using values from the flow.

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

* How to Find Records to Update and Set Their Values

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



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
<input type="text" value="Amount_c"/>	<input type="text" value="24000"/>
<input type="button" value="+ Add Field"/>	

Cancel

Done

17. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label

Triple

* API Name

Triple

Description

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount__c

Value

20000

+ Add Field

Cancel

Done

18. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label

single ac1

* API Name

single_ac1

Description

* How to Find Records to Update and Set Their Values

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



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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount_c

Value

← 34000



+ Add Field

Cancel

Done

19. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

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



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
<input type="text" value="Amount_c"/>	<input type="text" value="30000"/>
<div>+ Add Field</div>	

Cancel

Done

20. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label
Triple ac1

* API Name
Triple_ac1

Description

* How to Find Records to Update and Set Their Values

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

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

Set Filter Conditions

Condition Requirements to Update Record
None—Always Update Record

Set Field Values for the Room Booking Record

Field
Amount_c

Value
26000

+ Add Field

Cancel
Done

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

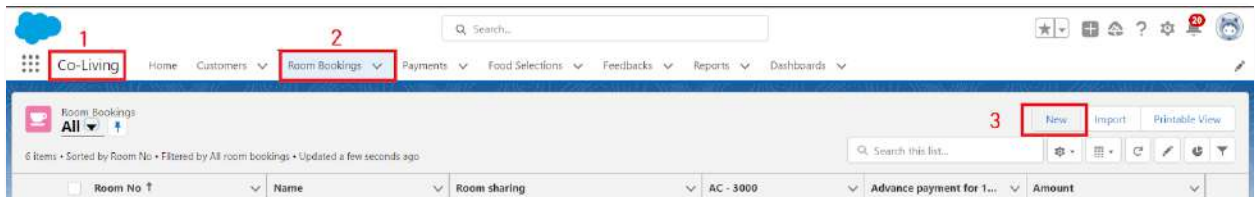
Activity 2:

Test the Flow

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



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



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

New Room Booking

* = Required Information

Information

Room No

AC - 3000

* Name

Prasad

* Room sharing

Double sharing - 12000

AC - 3000

Advance payment for 1month

Amount

Cancel
Save & New
Save

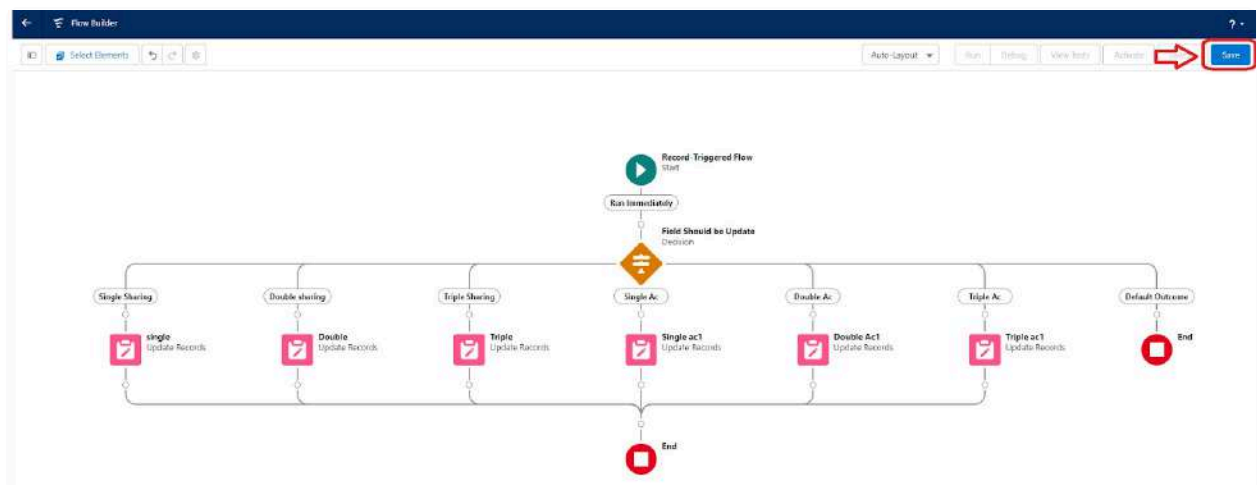
Co-Living Home Customers Room Bookings Payments Food Selections Feedbacks Reports Dashboards

Room Booking
RN-008

Related Details

Room No RN-008	AC - 3000 <input checked="" type="checkbox"/>
Name Prasad	Advance payment for 1month <input checked="" type="checkbox"/>
Room sharing Double sharing - 12000	Amount ₹30,000
Created By Veera Venkata Varaprasad Androthu, 19/06/2023, 12:37 pm	Last Modified By Veera Venkata Varaprasad Androthu, 19/06/2023, 12:37 pm

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



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

1

Save the flow

* Flow Label

Update Amount Field

* Flow API Name

Update_Amount_Field

Description

Show Advanced

2

Cancel

Save