

A CRM Application to Manage the Booking of Co-Living



Name : BALAKA YAGNESH

E-Mail : balakayagnesh@gmail.com

PROJECT ABSTRACT :

Our co-living space project is dedicated to building a vibrant and inclusive community where individuals can live, work, and connect with others who share their interests. We believe that a shared living environment promotes collaboration, alleviates feelings of isolation, and improves overall well-being.

The layout of our co-living space will be thoughtfully designed to provide both private areas and communal spaces. Our application will store user profiles, allowing residents to select from various AC rooms with options for multiple sharing arrangements. Users can choose from a daily menu of special food items and make payments using a variety of methods. Additionally, residents will have the opportunity to provide feedback on services such as room cleaning, internet access, and food quality.

INDEX

<u>TITLE</u>	<u>Page no.</u>
A CRM Application to Manage the Booking of Co-Living	1
Project Abstract	2
Salesforce	4 - 7
Object	7 - 12
Tab	12 - 16
The Lightning App	16 - 18
Fields & Relationships	18 - 64
Validation rule	64 - 66
Profile	66 - 70
Roles	70 - 72
Users	72 - 75
User Adoption	76 - 78
Reports	78 - 80
Dashboards	80 - 82
Flows	82 - 97

TASK 1 - Salesforce

Introduction :

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

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

What Is Salesforce?

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

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

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

<https://youtu.be/r9EX3IGde5k>

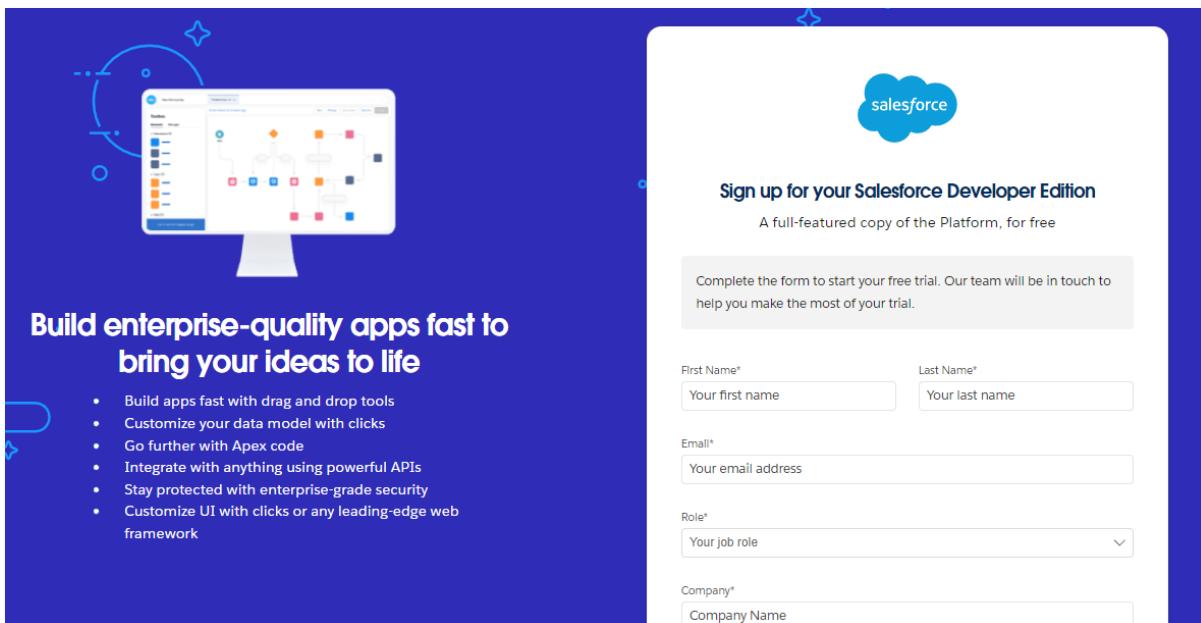
Activity 1 :

Creating Developer Account

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>

2. On the sign up form, enter the following details :



The image consists of two side-by-side screenshots. The left screenshot shows a computer monitor with a blue background. On the screen is a white interface for building enterprise-quality apps, featuring a grid of colored icons and a central workspace. A circular blue callout bubble with arrows points from the top-left towards the monitor. Below the monitor, the text "Build enterprise-quality apps fast to bring your ideas to life" is displayed, followed by a bulleted list of features:

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

The right screenshot shows a "Sign up for your Salesforce Developer Edition" page. It features the Salesforce logo at the top. Below it, the text "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". A callout box states: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form itself includes fields for First Name*, Last Name*, Email*, Role*, and Company*. The "Role*" field is a dropdown menu.

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 :

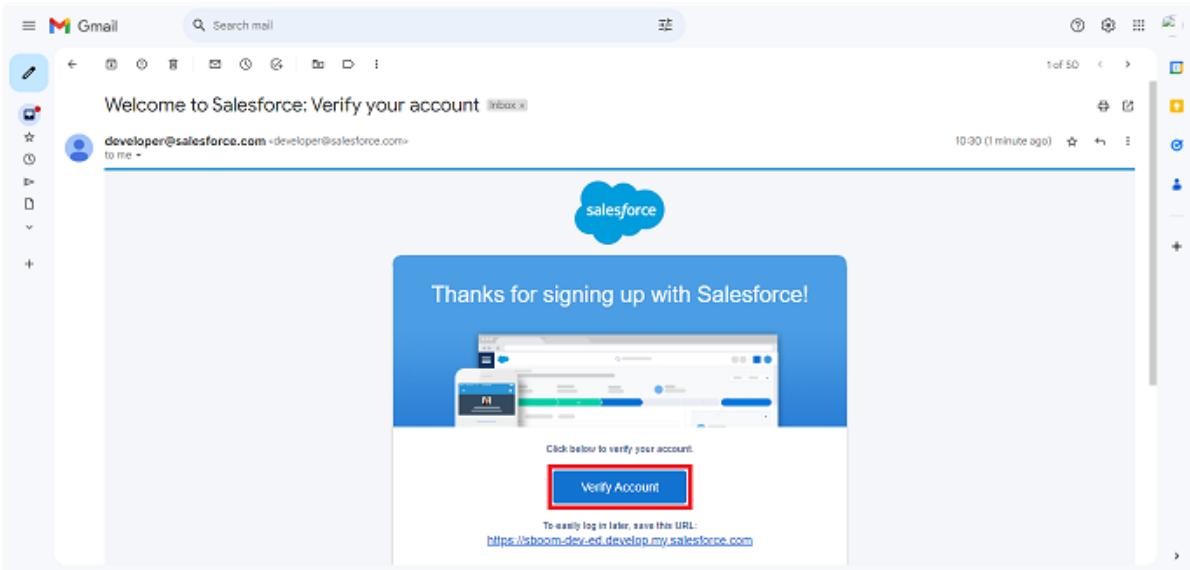
username@organization.com

Click on sign me up after filling these.

Activity 2 :

Account Activation

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

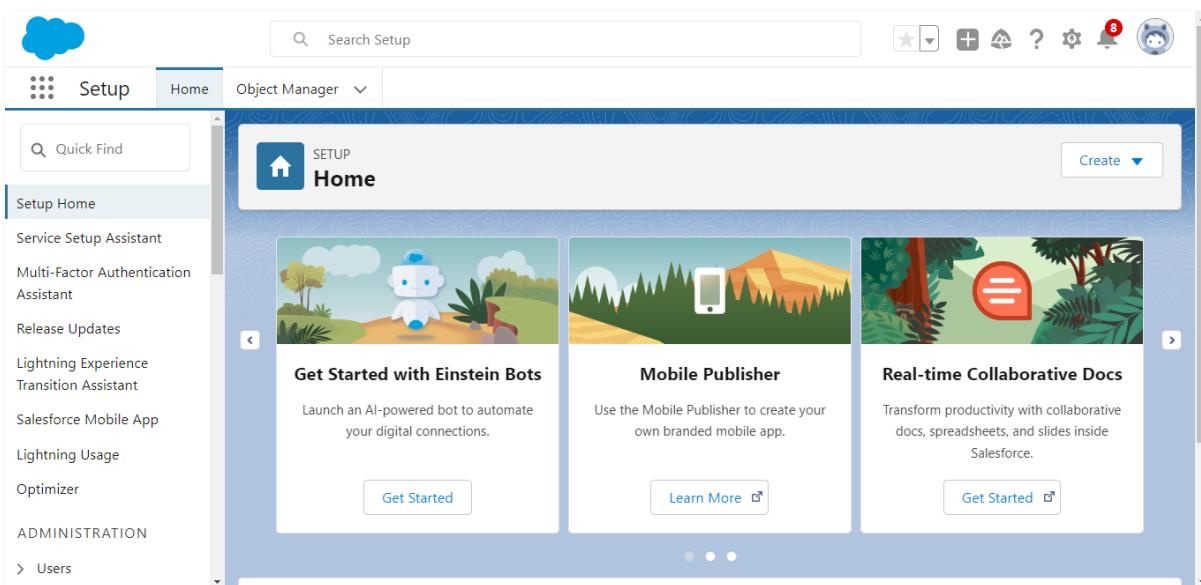


2. Click on Verify Account

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

The screenshot shows a "Change Your Password" form. At the top, it says "Enter a new password for lead@sb.oom. Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number", each with a green checkmark. Below these are two input fields: "New Password" and "Confirm New Password", both containing dots and labeled "Good" and "Match" respectively. Under "Security Question", there is a dropdown menu set to "In what city were you born?". In the "Answer" field, the text "asdfghjkl" is entered. A large red box highlights the entire form area, and another red box highlights the "Change Password" button at the bottom.

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



Task 2 - Object

Introduction :

What Is an Object?

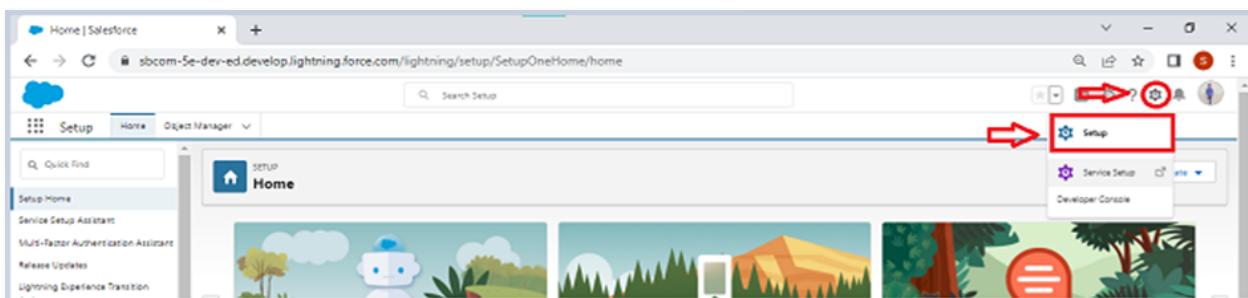
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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:

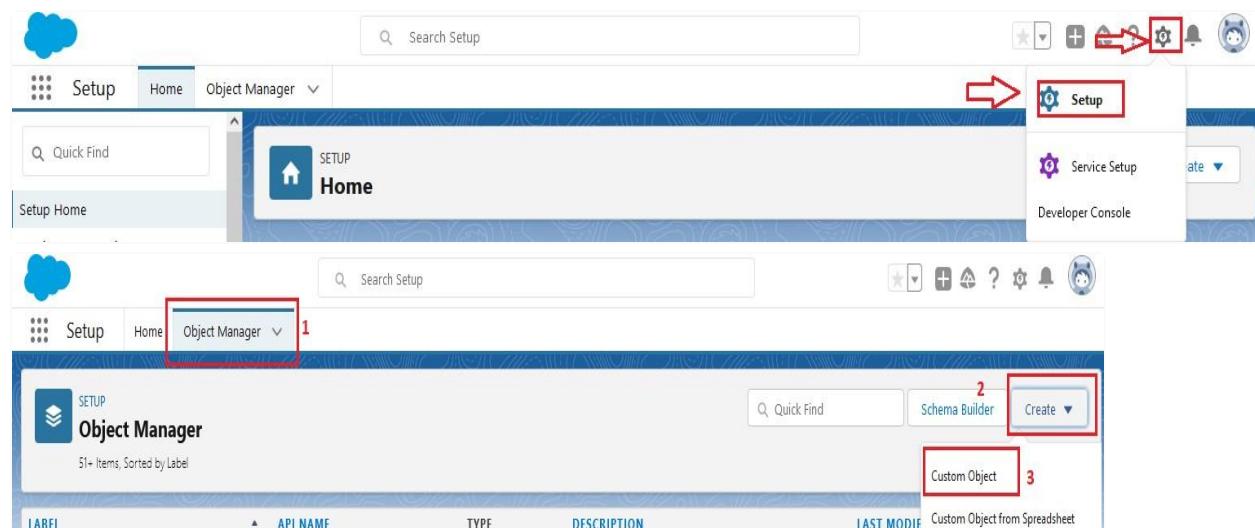


Activity 1 :

Create a custom object for Total Rooms:

To create a custom object, follow these steps:

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



3. Fill in the label as " Total Room ".
4. Fill in the plural label as " Total Rooms ".
5. Record name: "Total No Of Rooms"
6. Select the data type as "Text".

7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

The screenshot shows the 'Custom Object Definition Edit' screen in the Salesforce Setup. It includes sections for 'Custom Object Information', 'Record Name Label and Format', and various optional features and status settings. Red boxes and arrows highlight specific fields and checkboxes:

- Custom Object Information:** Shows 'Label' (Total Room) and 'Plural Label' (Total Rooms).
- Record Name Label and Format:** Shows 'Object Name' (Total_Rooms) and 'Record Name' (Total_No_of_Rooms).
- Optional Features:** Shows 'Allow Reports' (selected) and 'Allow Search' (selected).
- Save Buttons:** Shows 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

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

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.

Task 3 - Tab

Introduction :

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.

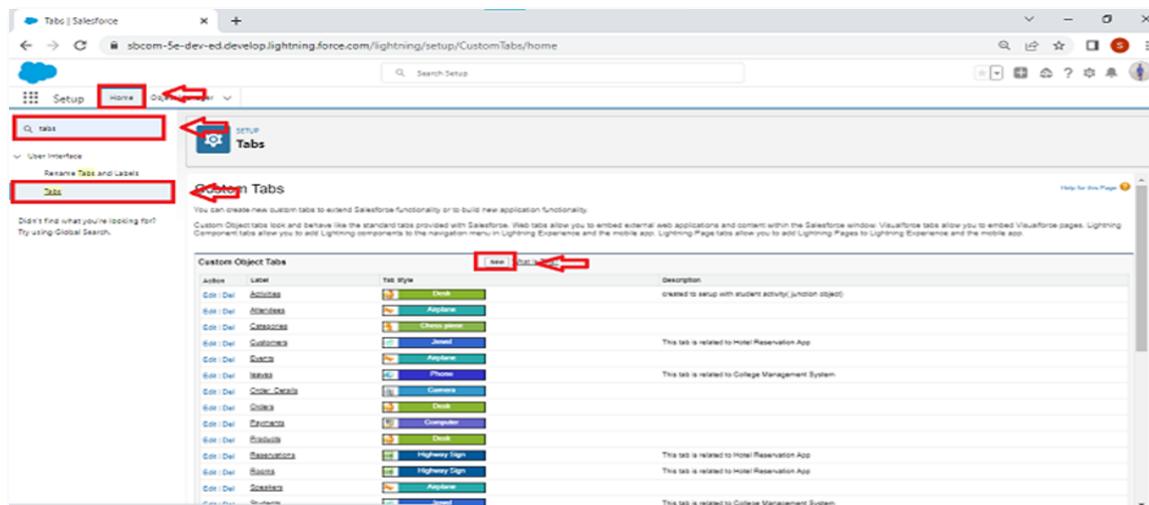
Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps

Activity 1 :

Creating a Tab for Total Rooms

To create a Tab:(Total Rooms)

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



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

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object now.

Object: Total Room

Tab Style: Keys

(Optional) Choose a Home Page Custom Link to show as a splash page the first time a user logs in.

Enter a short description.

Description:

Tab Style Selector - Google Chrome
thesmarbridge-2c6-dev-ed.my.salesforce.com/_ui/common/html/pages/MotifPicker?id=p2

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

Airplane	Alarm clock	Apple[1]	Balls
Bank	Bell	Big top	Boat
Books	Bottle	Box	Bridge
Building	Building Block	Caduceus	Camera
Can	Car[1]	Castle	CD/DVD
Cell phone	Chalkboard	Chess piece	Chip
Circle	Compass	Computer	Credit card
CRT TV	Cup[1]	Desk	Diamond
Dice	Factory	Fan[1]	Flag
Form	Gears	Globe	Guitar
Hammer	Hands	Hand saw	Headset
Heart	Helicopter	Hexagon	Highway Sign
Hot Air Balloon	Insect	IP Phone	Jewel
Keys	Laptop	Leaf[1]	Lightning

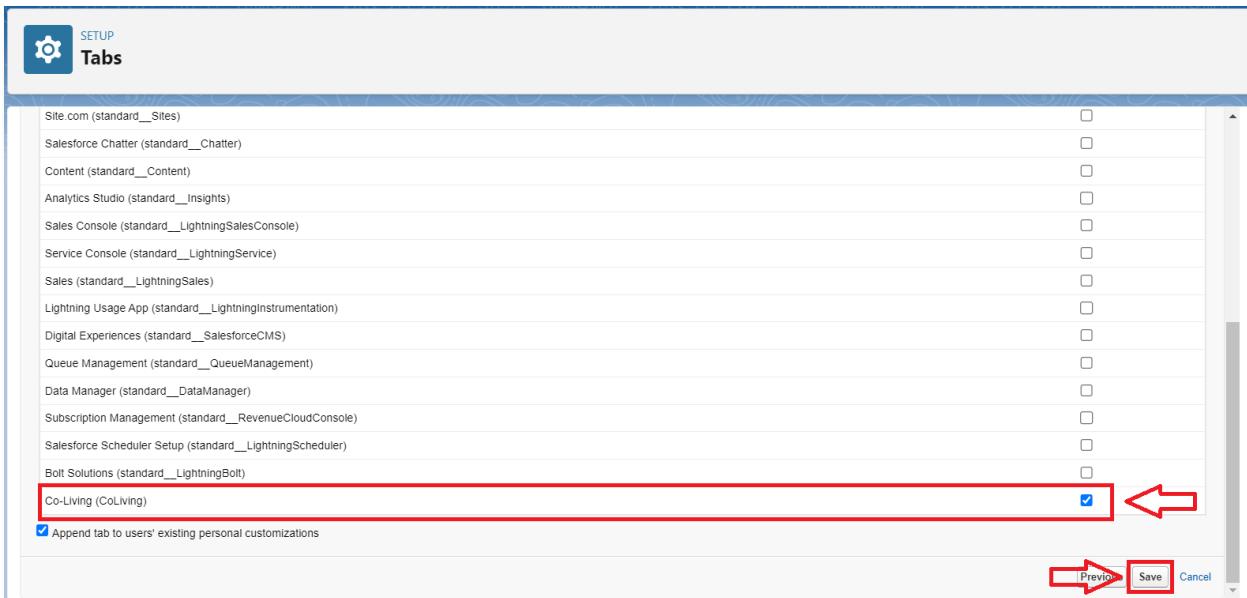
Next Cancel

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

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.



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 same as like above.

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

Task 4 - The Lightning App

Introduction :

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

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

Activity 1 :

Create a Lightning App

To create a lightning app page:

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

The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with "app manager" typed in. Below it, there are tabs for "Setup", "Home", and "Object Manager". A red box highlights the search bar. In the center, there's a section titled "Lightning Experience App Manager" with a "Clone Apps(Beta)" link. To the right, there are two buttons: "New Lightning App" and "New Connected App", both highlighted with red boxes. The main area displays a table of existing apps, with 35 items listed. The columns include "App Name", "Developer Name", "Description", "Last Modified", "App Type", and "V...". A red arrow points to the "New Lightning App" button at the top right of the app list.

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

The screenshot shows the "New Lightning App" configuration page. The title is "New Lightning App". Under "App Details & Branding", there are sections for "App Details" and "App Branding". In the "App Details" section, there is a field labeled "App Name" with the placeholder "Name your app..." and a red box highlighting it. In the "App Branding" section, there is a "Primary Color Hex Value" field set to "#0070D2" with a red box highlighting it. At the bottom right of the page, there is a "Next" button highlighted with a red box and a red arrow pointing to it.

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.

App Settings

Navigation Items 1

Available Items 2

Selected Items 4

4. To Add User Profiles:

New Lightning App

User Profiles

Available Profiles

Selected Profiles

Save & Finish 3

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

Task 5 - Fields & Relationships

Introduction :

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.

The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Customer1' row in the list. An arrow points to the 'Created Date' column for this row, which displays '12/06/2023'. The 'Customer1' object is identified by its label 'Customer1' and its internal name 'Customer__c'.

Object	Internal Name	Type	Created Date
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object	
Credit Memo	CreditMemo	Standard Object	
Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object	
Credit Memo Line	CreditMemoLine	Standard Object	
Customer	Customer	Standard Object	
Customer1	Customer__c	Custom Object	12/06/2023
D&B Company	DandBCompany	Standard Object	
Data Use Legal Basis	DataUseLegalBasis	Standard Object	
Data Use Purpose	DataUsePurpose	Standard Object	
Digital Wallet	DigitalWallet	Standard Object	
Duplicate Record Item	DuplicateRecordItem	Standard Object	
Duplicate Record Set	DuplicateRecordSet	Standard Object	
Email Message	EmailMessage	Standard Object	

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

Customer1

Fields & Relationships

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 creating a custom field named 'Customer Custom Field' under the object 'Customer1'. The 'Field Label' is set to 'Phone no' and the 'Field Name' is auto-generated as 'Phone_no'. The 'Data Type' is set to 'Phone'. The 'General Options' section includes a checked 'Always require a value in this field in order to save a record' checkbox. The 'Save' button is highlighted with a red arrow.

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:

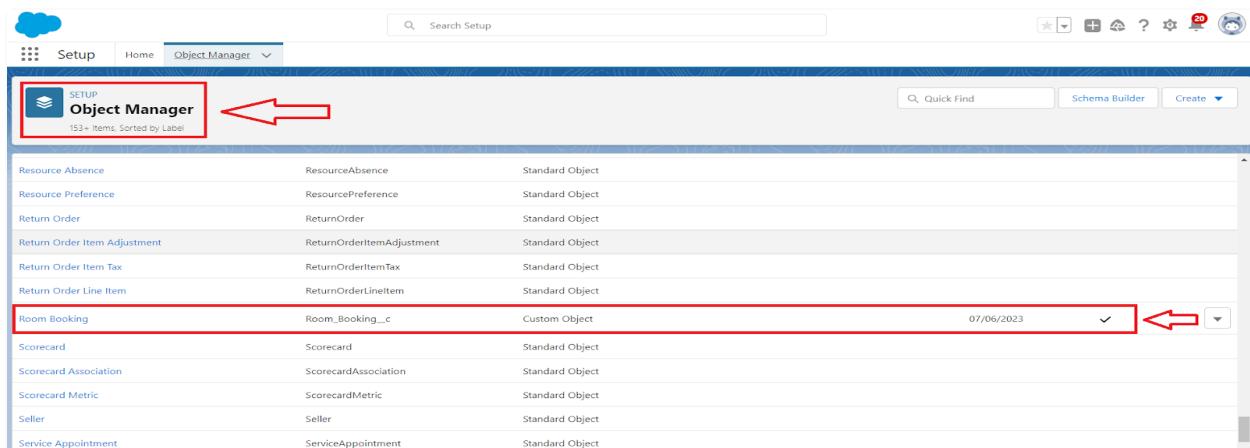
1. Go to setup > click on Object Manager > type object name(Customer1) in search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data type as a “Picklist” and Click on Next
4. Fill the Above as following:
 - Field Label: Current Status
 - Value - Select enter values 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.



The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'SETUP' and 'Object Manager' selected. Below the navigation bar, a list of objects is displayed. The 'Room Booking' object is highlighted with a red box and a red arrow pointing to it from the left. The 'Room Booking' row also has a red box around its entire row. On the far right of the 'Room Booking' row, there is a date field set to '07/06/2023' with a dropdown arrow, which is also highlighted with a red box and a red arrow pointing to it from the right.

Object	Label	Type	Created Date
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	07/06/2023
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

SETUP > OBJECT MANAGER
Room Booking

Details

Fields & Relationships

Fields & Relationships

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

Fields & Relationships

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

4. Click on Next

SETUP > OBJECT MANAGER
Room Booking

Step 2. Enter the details

Field Label: Room Sharing (1)

Values: Use global picklist value set
 Enter values, with each value separated by a new line
Single sharing
Double sharing
Triple sharing (2)

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set (3)

Field Name: Room_Sharing
Description:
Help Text:
Default Value: Show Formula Editor

Auto add to custom report type: Add this field to existing custom report types that contain this entry (3)

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.

SETUP Object Manager (1)
153+ Items. Sorted by Label

Object Name	API Name	Type	Last Modified
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 (2)	07/06/2023
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

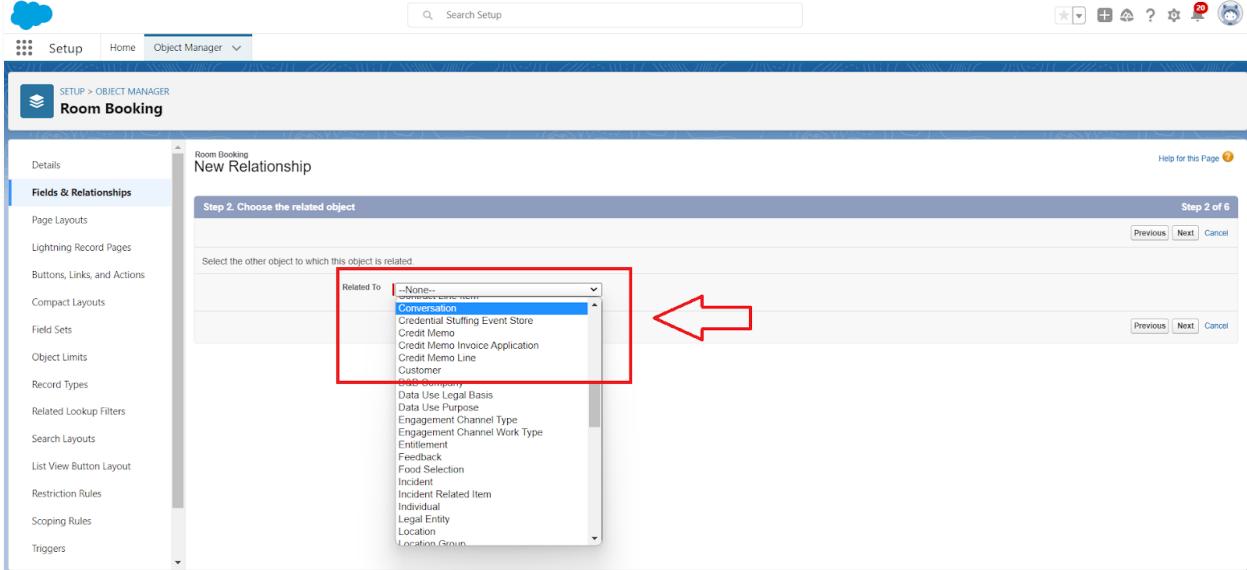
The screenshot shows the Salesforce Object Manager for the 'Room Booking' object. The left sidebar lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists several fields such as AC - 3000, Advance payment for 1month, Amount, Created By, Last Modified By, Name, and Room No. A red box highlights the 'New' button at the top right of the table, and a red arrow points to it.

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

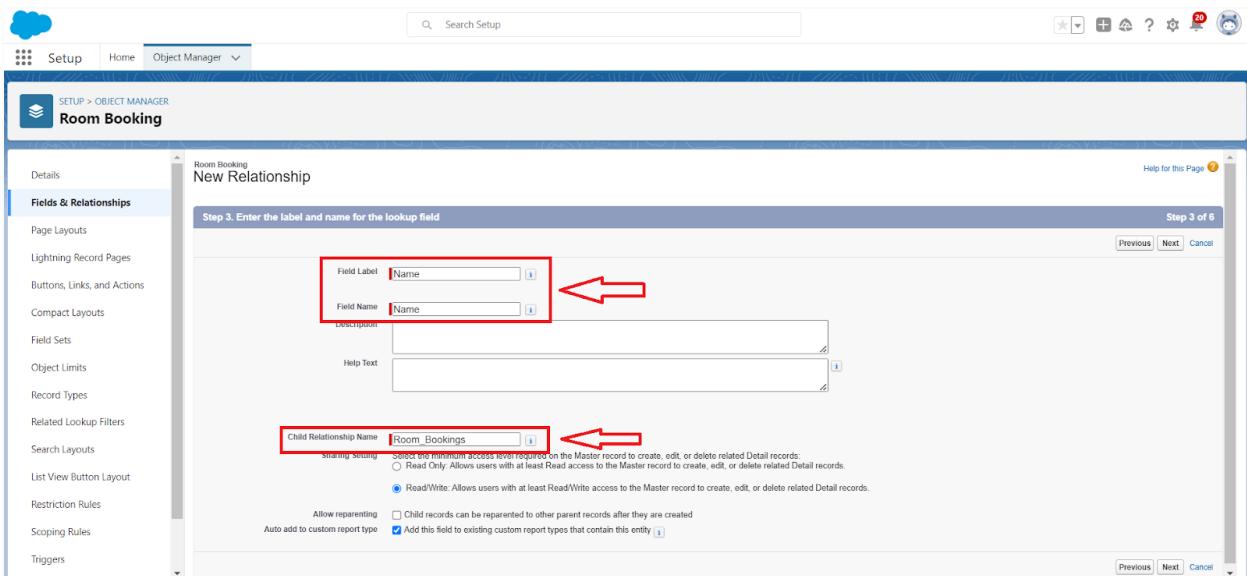
4. Click on Next

The screenshot shows the 'Data Type' configuration screen for a custom field. The left sidebar shows 'Fields & Relationships' selected. The main area is titled 'Specify the type of information that the custom field will contain.' It lists several data types: None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship (which is selected and highlighted with a red box), External Lookup Relationship, Checkbox, Currency, Date, DateTime, and Email. A red arrow points to the 'Master-Detail Relationship' option, and another red arrow points to the 'Next' button at the top right.

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



6. Fill the Above as following:
- Change the Field Label: Name
 - Field Name : It's gets auto generated



- Click on Next > Next > Save and new.

3. To create fields in an object:

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

4. Click on Next
5. Fill the Above as following:
 - Field Label: AC-3000
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new

4. To create fields in an object:

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

5. To create fields in an object:

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

6. To Create a Fields & Relationship to an Object

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

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

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

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

Total Room
New Custom Field

Step 3. Define the summary calculation

Select Object to Summarize

Master Object	Total Room
Summarized Object	Room Bookings ▾

Select Roll-Up Type

COUNT

SUM
 MIN
 MAX

Field to Aggregate: None

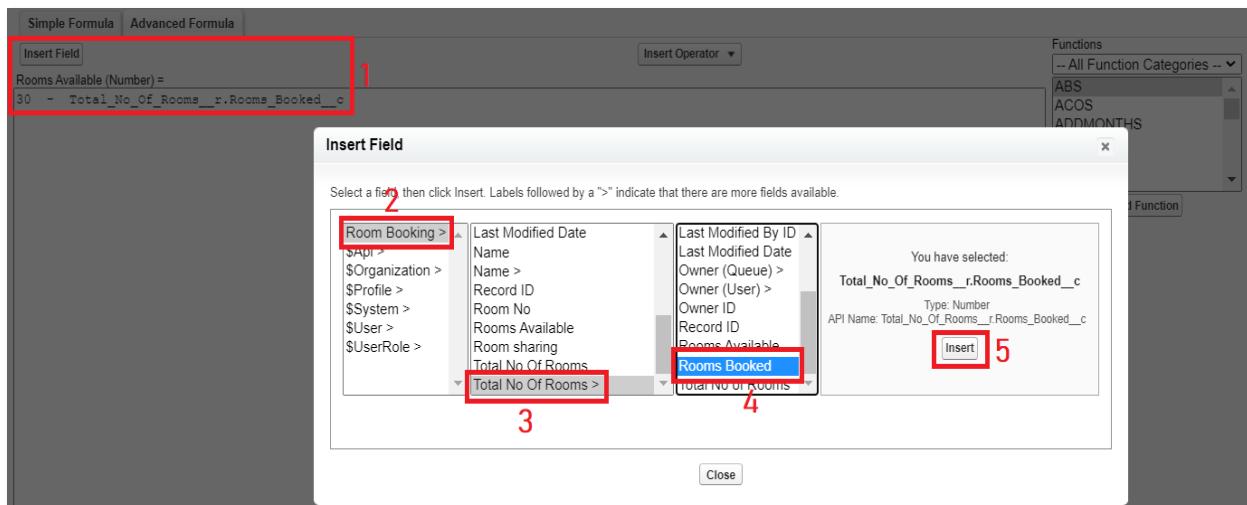
Filter Criteria

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

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



The screenshot shows a formula editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula". Below the tabs, there's a text input field containing the formula: "Rooms Available (Number) = 30 - Total_No_of_Rooms_x.Rooms_Booked_c". A red box highlights this formula, and a red arrow points from the text towards the right side of the screen. To the right of the formula, there's a "Functions" panel with a dropdown menu set to "All Function Categories" and a scrollable list of functions including ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the functions list is a button labeled "Insert Selected Function". At the bottom of the editor, there's a status bar with the text "Check Syntax" followed by a green message: "No syntax errors in merge fields or functions. (Compiled size: 36 characters)". Another red box highlights this status bar, and a red arrow points from it towards the right side of the screen.

- 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

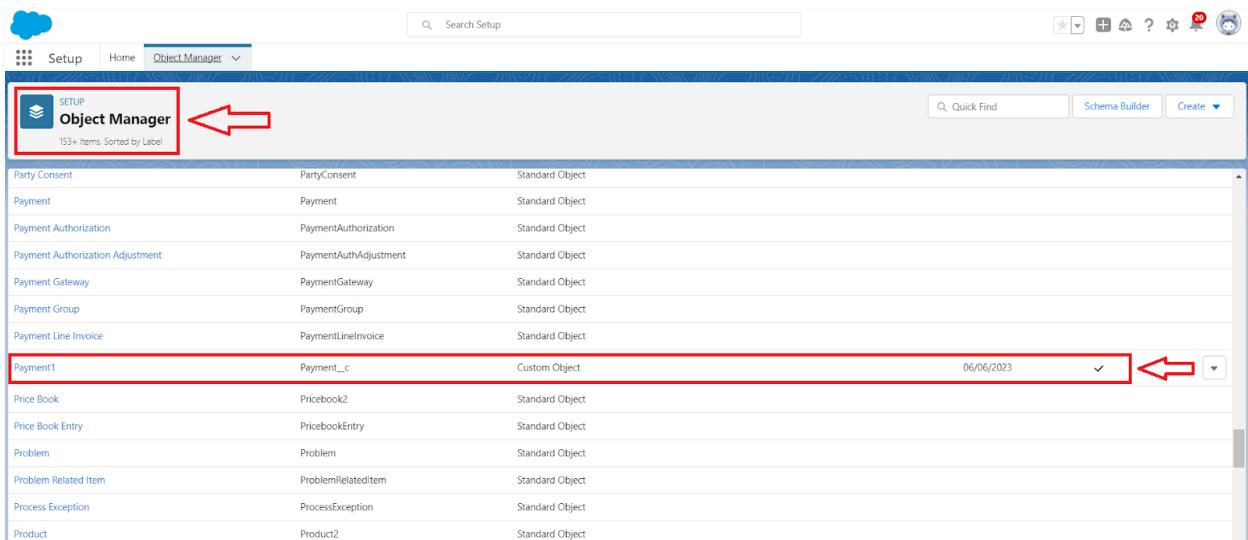
- Click on Next > Next > Save and new

Activity 3 :

Creation of Fields & Relationship for Payment Object

1. To create fields & relationship to an object:

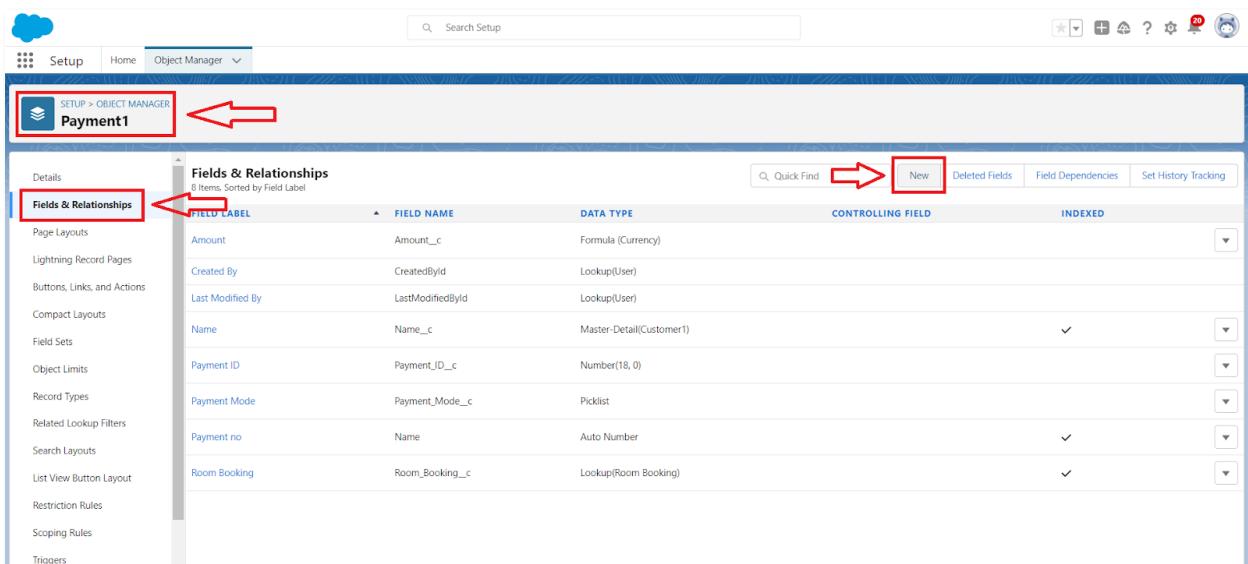
1. Go to setup > click on Object Manager > type object name(Payment1) in the search bar > click on the object.



The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' button in the top left corner. Another red box highlights the 'Payment1' row in the list, which is selected. A red arrow points to the 'Payment1' row. A red box also highlights the date field '06/06/2023' at the end of the row.

Object Name	Object Label	Type	Last Modified
Party Consent	PartyConsent	Standard Object	
Payment	Payment	Standard Object	
Payment Authorization	PaymentAuthorization	Standard Object	
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object	
Payment Gateway	PaymentGateway	Standard Object	
Payment Group	PaymentGroup	Standard Object	
Payment Line Invoice	PaymentLineInvoice	Standard Object	
Payment1	Payment__c	Custom Object	06/06/2023
Price Book	Pricebook2	Standard Object	
Price Book Entry	PricebookEntry	Standard Object	
Problem	Problem	Standard Object	
Problem Related Item	ProblemRelatedItem	Standard Object	
Process Exception	ProcessException	Standard Object	
Product	Product2	Standard Object	

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



The screenshot shows the 'Fields & Relationships' page for the 'Payment1' object. A red box highlights the 'Payment1' label in the top left. Another red box highlights the 'Fields & Relationships' link in the sidebar. A red arrow points to the 'New' button in the top right corner of the main table area.

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

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

The screenshot shows the Salesforce Setup interface under 'Object Manager'. A custom object named 'Payment1' is selected. In the 'Fields & Relationships' section, the 'Data Type' is being configured. A red box highlights the 'Master-Detail Relationship' option, which is described as creating a relationship between the current object and another object. A red arrow points from the left margin to this highlighted section.

4. Click on Next

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

The screenshot shows the 'New Relationship' step in the Salesforce setup. It is Step 2 of 6. A red box highlights the 'Related To' dropdown menu, which lists various objects including 'Customer'. A red arrow points from the left margin to this dropdown menu.

Payment1
New Relationship

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

Field Label: Name
Field Name: Name

Child Relationship Name: Payments1

Sharing Settings: Select the minimum access level required on the Master record to create, edit, or delete related Detail records:
 Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
 ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: Child records can be reparented to other parent records after they are created
 Auto add to custom report type: Add this field to existing custom report types that contain this entity

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.

Object	Label	Type	Last Modified
Party Consent	PartyConsent	Standard Object	
Payment	Payment	Standard Object	
Payment Authorization	PaymentAuthorization	Standard Object	
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object	
Payment Gateway	PaymentGateway	Standard Object	
Payment Group	PaymentGroup	Standard Object	
Payment Line Invoice	PaymentLineInvoice	Standard Object	
Payment1	Payment_c	Custom Object	06/06/2023
Price Book	Pricebook2	Standard Object	
Price Book Entry	PricebookEntry	Standard Object	
Problem	Problem	Standard Object	
Problem Related Item	ProblemRelatedItem	Standard Object	
Process Exception	ProcessException	Standard Object	
Product	Product2	Standard Object	

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

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

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 “Lookup Relationship”

4. Click on Next

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

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

Data Type

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

Lookup Relationship (highlighted with a red box)

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

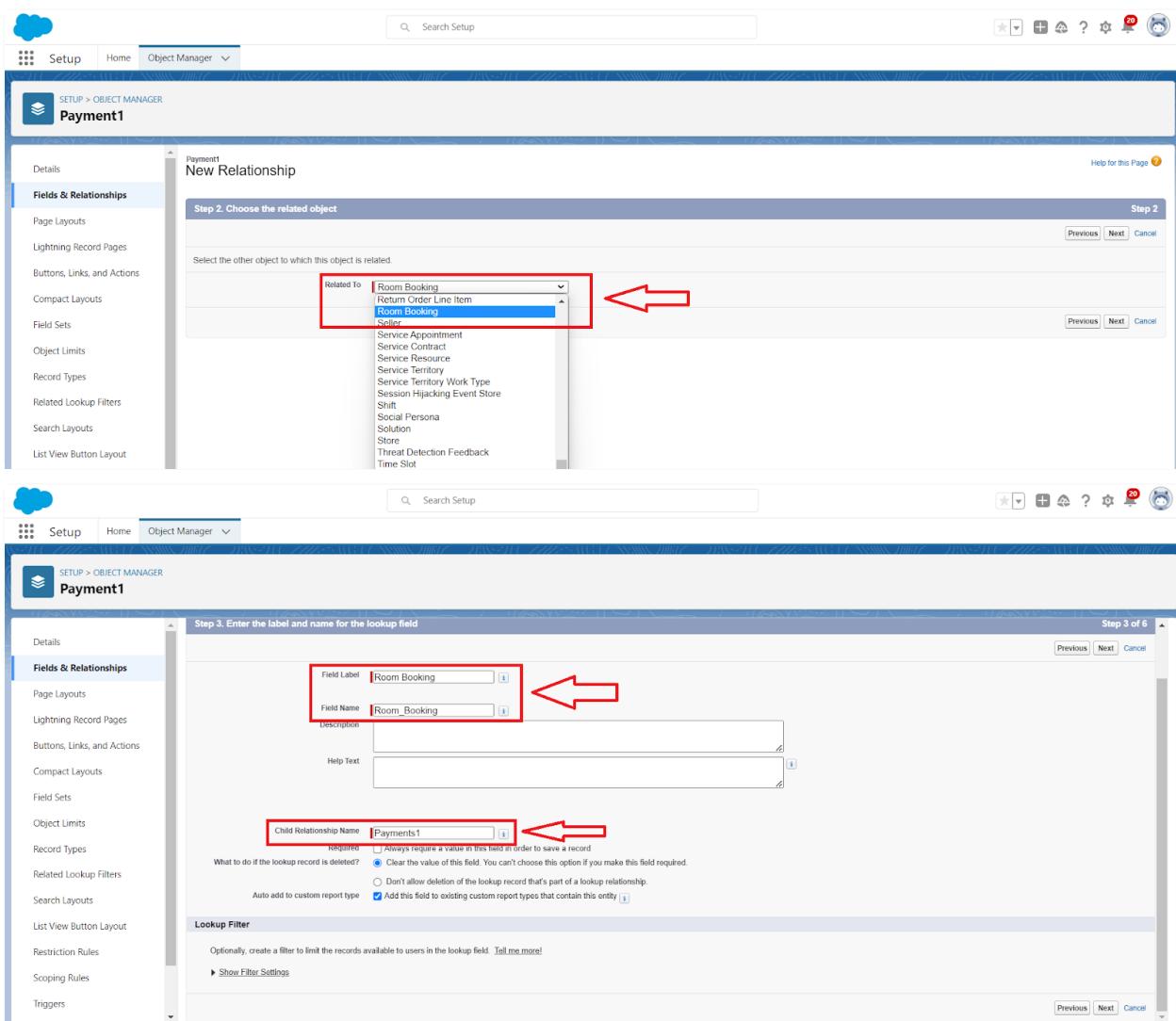
- The relationship field is required on all detail records.
- The creation and sharing of a detail record are determined by the master record.
- When a user deletes a master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.
- The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Checkbox

Currency

Date

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



6. Fill the Above as following:

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

3. Creation of another fields for the Payment1 object

To create fields in an object:

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

Payment Authorization	PaymentAuthorization	Standard Object
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object
Payment Gateway	PaymentGateway	Standard Object
Payment Group	PaymentGroup	Standard Object
Payment Line Invoice	PaymentLineInvoice	Standard Object
Payment1	Payment__c	Custom Object
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

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

3. Select Data Type as a “Picklist”

SETUP > OBJECT MANAGER
Payment1

Details

Fields & Relationships

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

SETUP > OBJECT MANAGER
Payment1

Details

Fields & Relationships

Field Label: **Payment Mode**

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

Cash
Check
Credit card
Debit card
UPI
Phonepe
Gpay

Field Name: Payment_Mode

Description:

Help Text:

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

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

Default Value: [Show Formula Editor](#)

4. Fill the Above as following:

- Field Label: Payment Mode
- Value - Select enter values with each value separated by a new line
 1. Cash
 2. Check
 3. Credit card
 4. Debit card
 5. UPI
 6. Phonepe
 7. Gpay

8. Paytm

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

Cross Object Formula Field:

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

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

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

4. Create a Cross object formula Field in Payment1 Object

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'SETUP', 'Home', and 'Object Manager'. The main area is titled 'Object Manager' with a sub-header '153+ items. Sorted by Label'. A search bar at the top right contains 'Search Setup'. Below the header, there's a 'Quick Find' input field, a 'Schema Builder' button, and a 'Create' button. The main list displays various objects with their names, API names, and object types. The 'Payment1' object is highlighted with a red box and a red arrow points to the dropdown menu icon in the last column of its row.

Name	API Name	Type	
Payment Authorization	PaymentAuthorization	Standard Object	
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object	
Payment Gateway	PaymentGateway	Standard Object	
Payment Group	PaymentGroup	Standard Object	
Payment Line Invoice	PaymentLineInvoice	Standard Object	
Payment1	Payment__c	Custom Object	06/06/2023
Price Book	Pricebook2	Standard Object	
Price Book Entry	PricebookEntry	Standard Object	
Problem	Problem	Standard Object	
Problem Related Item	ProblemRelateditem	Standard Object	
Process Exception	ProcessException	Standard Object	
Product	Product2	Standard Object	

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

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

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 “Formula”

4. Click on Next

SETUP > OBJECT MANAGER
Payment1

Fields & Relationships

Data Type

None Selected

Auto Number

Formula

Roll-Up Summary

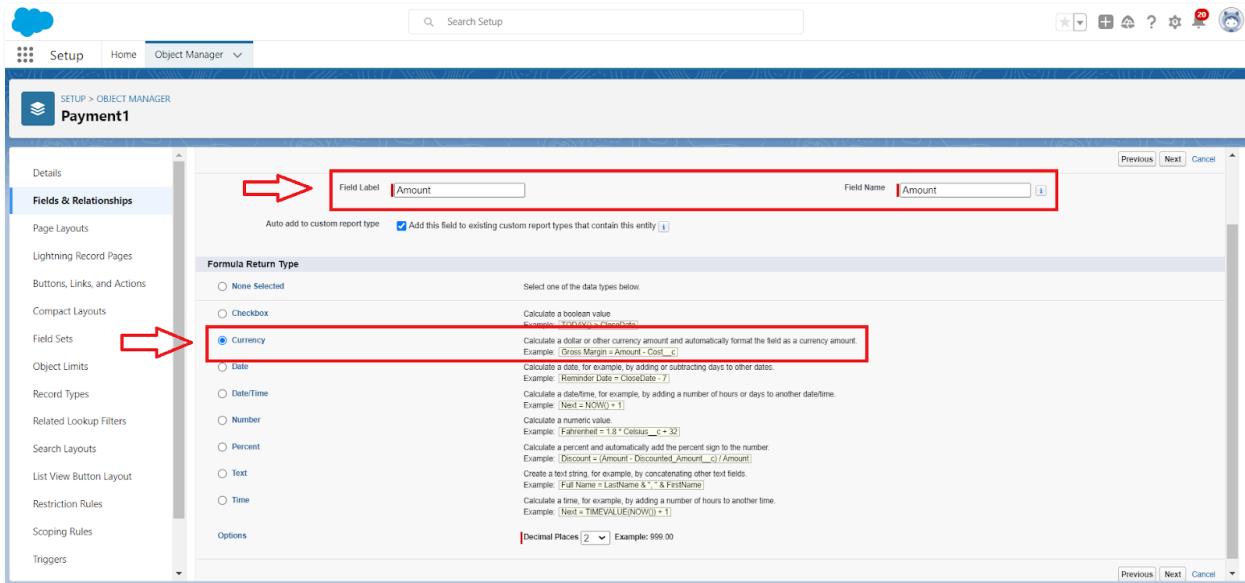
Lookup Relationship

Master-Detail Relationship

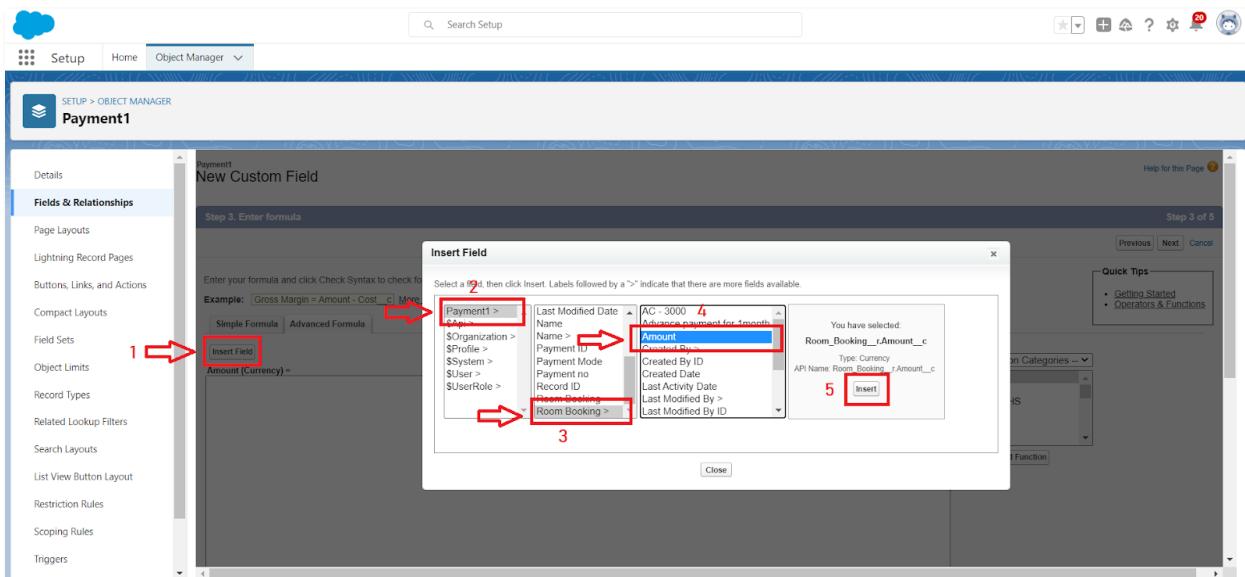
External Lookup Relationship

Next Cancel

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".



Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

RoomBooking__r.x.NewArrival_x

Check Syntax! No syntax errors in merge fields or functions. (Compiled size: 31 characters)

Description Help Text

Blank Field Handling

If your formula references any number, currency, or percent fields, specify what happens to the formula output when their values are blank.

Treat blank fields as zeros Treat blank fields as blanks

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

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.

Search Setup

Object Manager

103+ items. Sorted by Label

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	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

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

Food Selection

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast__c	Picklist		
Created By	CreatedById	Lookup(User)		
Dinner	Dinner__c	Picklist		
Food Selection No	Name	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Lunch	Lunch__c	Picklist		
Name	Name__c	Master-Detail(Customer1)		
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select dinner	Select_dinner__c	Picklist	Dinner	

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

4. Click on Next

Data Type

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

Master-Detail Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or “detail”) and another object (the parent, or “master”) where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

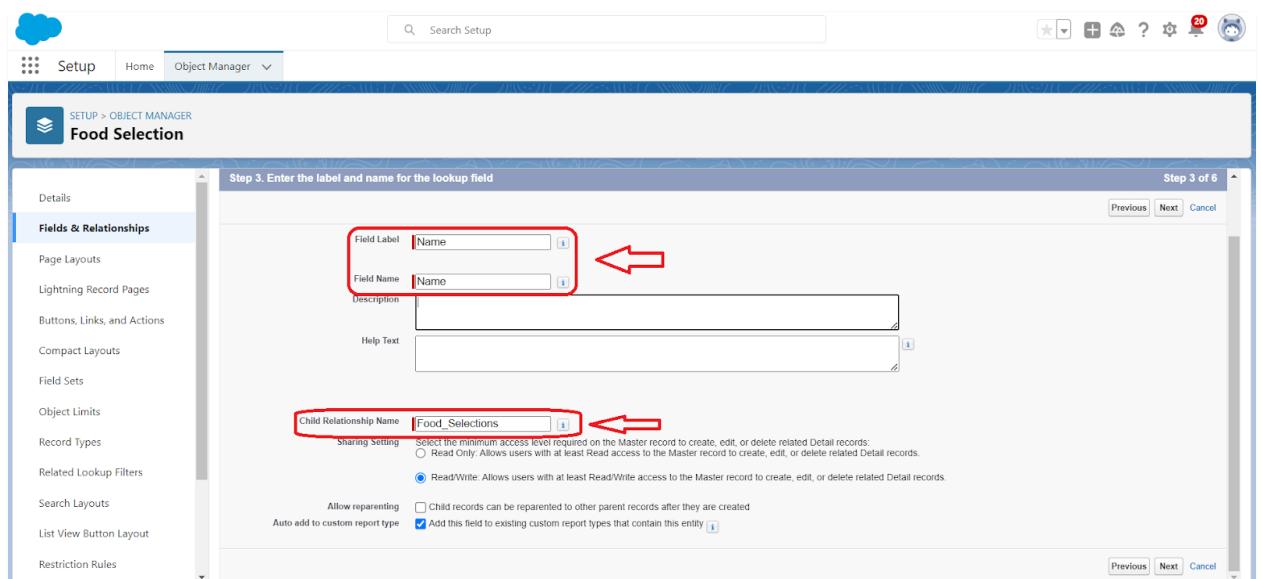
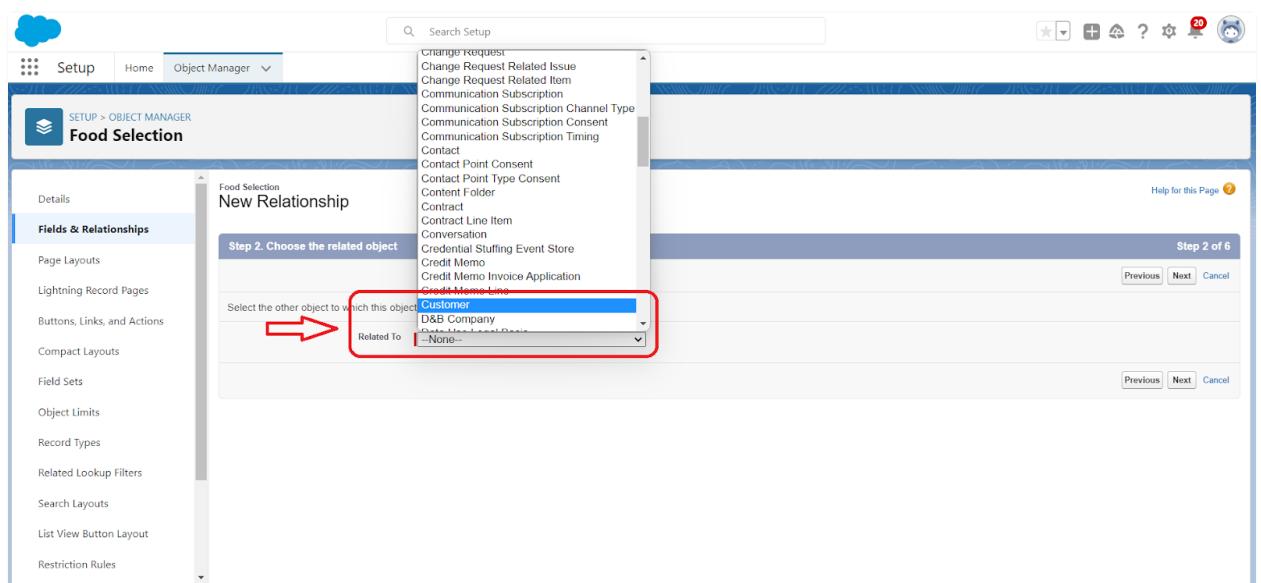
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

External Lookup Relationship

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

- Checkbox
- Currency
- Date
- Date/Time
- Email

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



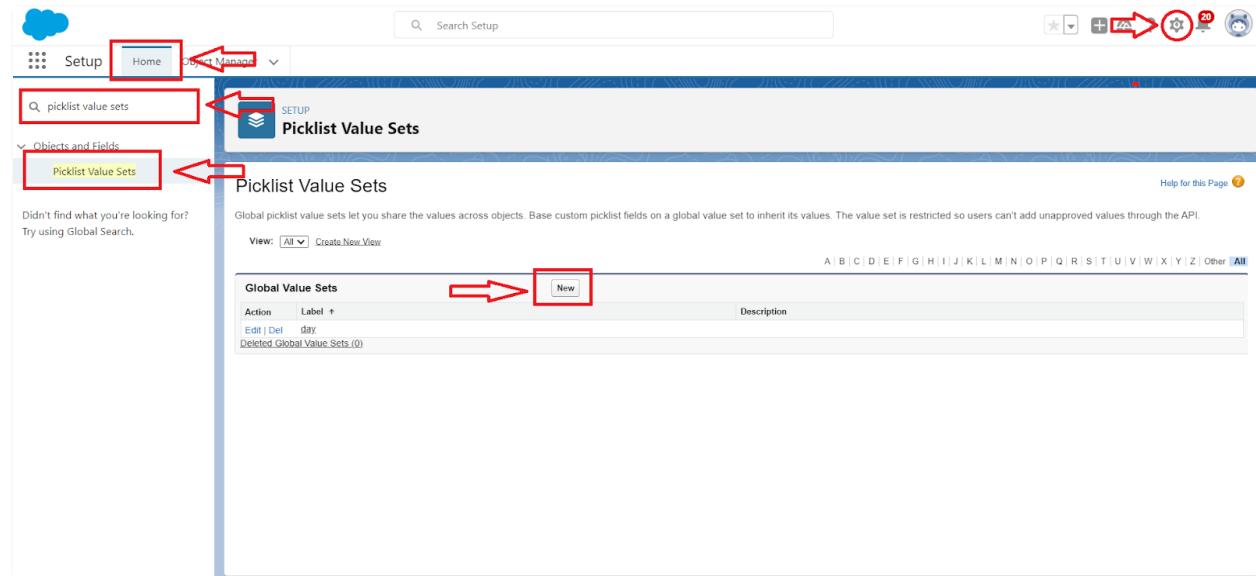
6. Fill the Above as following:
 - Change the Field Label: Name
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

Picklist value sets:

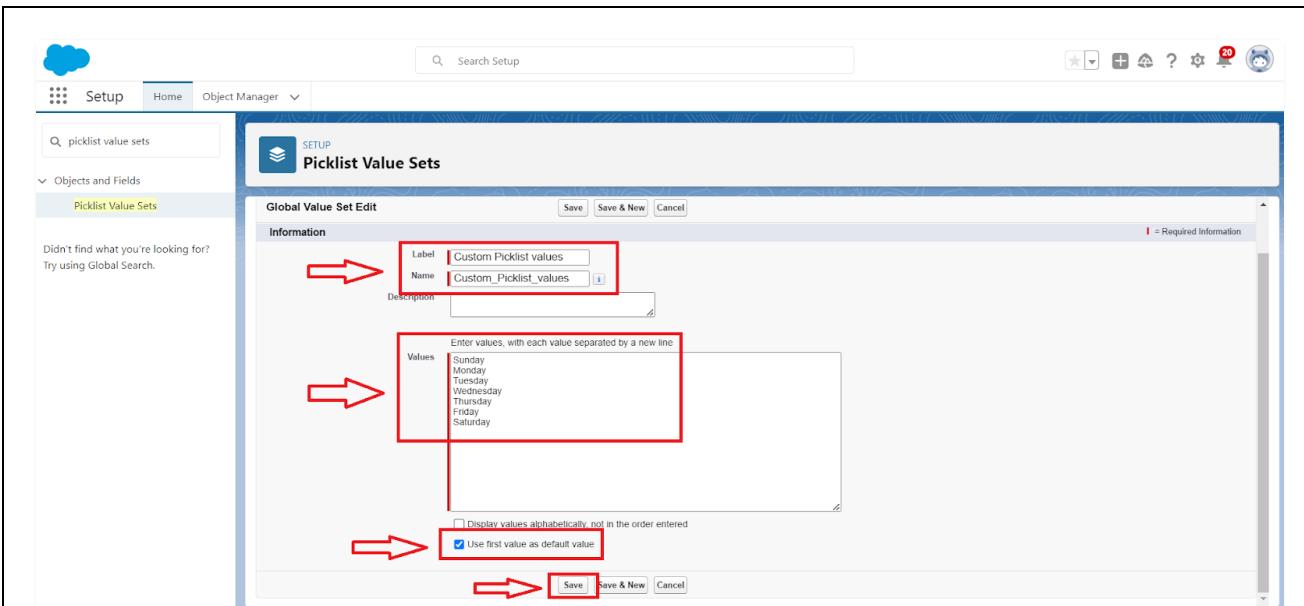
Global picklist value sets let you share the values across objects. Base custom picklist fields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

Create a picklist value set:

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



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



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

2. Create a picklist Field for Food selection object

To create fields in an object:

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

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

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

Food Selection

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast__c	Picklist		
Created By	CreatedById	Lookup(User)		
Dinner	Dinner__c	Picklist		
Food Selection No	Name	Auto Number		
Last Modified By	LastModifiedById	Lookup(User)		
Lunch	Lunch__c	Picklist		
Name	Name__c	Master-Detail(Customer1)		
Select Breakfast	Select_Breakfast__c	Picklist	Breakfast	
Select dinner	Select_dinner__c	Picklist	Dinner	

3. Select Data Type as a “Picklist”

Food Selection

Fields & Relationships

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

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

The screenshot shows the 'Object Manager' section of the Salesforce Setup. A new custom field is being created for the 'Food Selection' object. The 'Field Label' is set to 'Breakfast'. Under 'Values', the 'Use global picklist value set' option is selected, and under 'Custom Picklist values', 'Custom Picklist values' is chosen. The 'Required' checkbox is checked. The 'Default Value' section shows a formula editor with the placeholder 'Use formula syntax: Enclose text and picklist value API names in double quotes ("Text", "Name"). Include numbers without quotes. To reference a field from a Custom Metadata type record use \$CustomMetadataType__mdRecordAPIName\$Field'. The 'Step 2 of 4' header indicates this is the second step in the wizard.

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.

The screenshot shows the 'Object Manager' page in Salesforce. The 'Food Selection' object is listed in the grid. A red arrow points to the 'Food Selection' label in the first column. Another red arrow points to the dropdown menu icon in the last column of the same row.

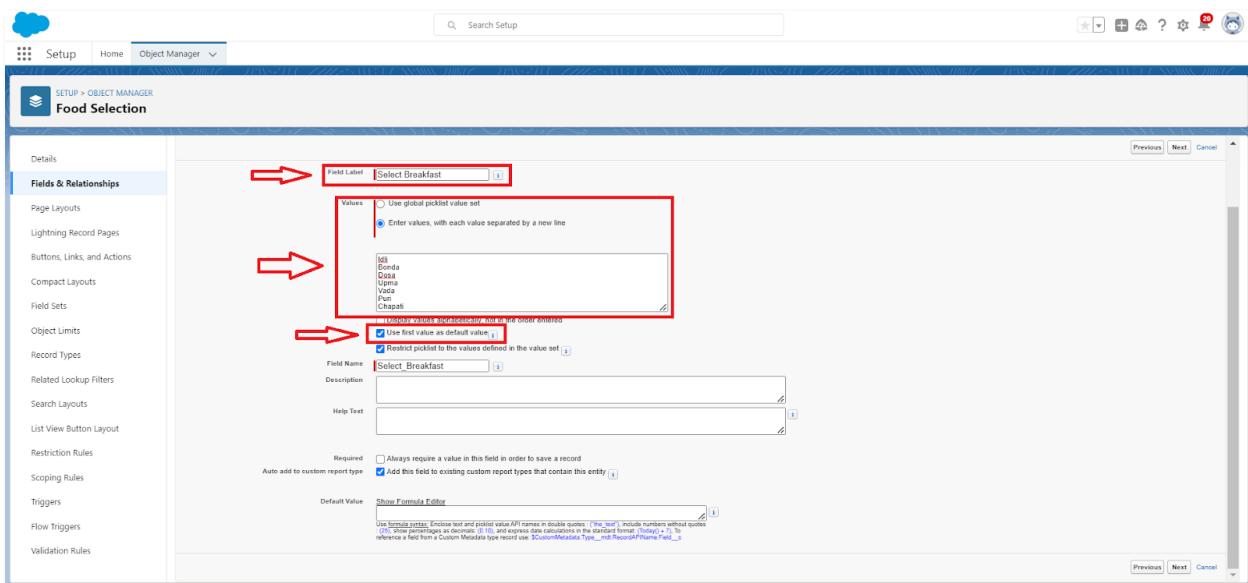
Object Name	Label	Type	Created Date
Entitlement Contact	EntitlementContact	Standard Object	
Event	Event	Standard Object	
Feedback	Feedback_c	Custom Object	07/06/2023
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object	
Finance Transaction	FinanceTransaction	Standard Object	
Food Selection	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	
Invoice	Invoice	Standard Object	
Invoice Line	InvoiceLine	Standard Object	
Lead	Lead	Standard Object	

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

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon, followed by 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Setup' with a magnifying glass icon. To the right are various setup icons. The main area has a title 'Food Selection' with a red box and arrow. On the left is a sidebar with links like 'Details', 'Fields & Relationships' (which is highlighted with a red box and arrow), 'Page Layouts', etc. The main content is a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. There are 10 items listed. A red arrow points to the 'New' button at the top right of the table.

2. Select Data Type as a “Picklist”

The screenshot shows the Salesforce Setup interface. The top navigation and sidebar are identical to the previous screenshot. The main content shows the 'Fields & Relationships' section. On the left, 'Fields & Relationships' is selected in the sidebar with a red box and arrow. The right side lists various data types with their descriptions. The 'Picklist' option is highlighted with a red box and arrow. The description for 'Picklist' states: 'Allows users to select a value from a list you define.' Another red arrow points to this description text.



3. Fill the Above as following:

- Field Label: Select Breakfast
- Under Value - Enter values, with each value separated by a new line
 1. Idli
 2. Bonda
 3. Dosa
 4. Upma
 5. Vada
 6. Puri
 7. Chapati
- Select Checkbox Use First value as default Value
- Click on Next > Next > Save and new.

Field Dependency:

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

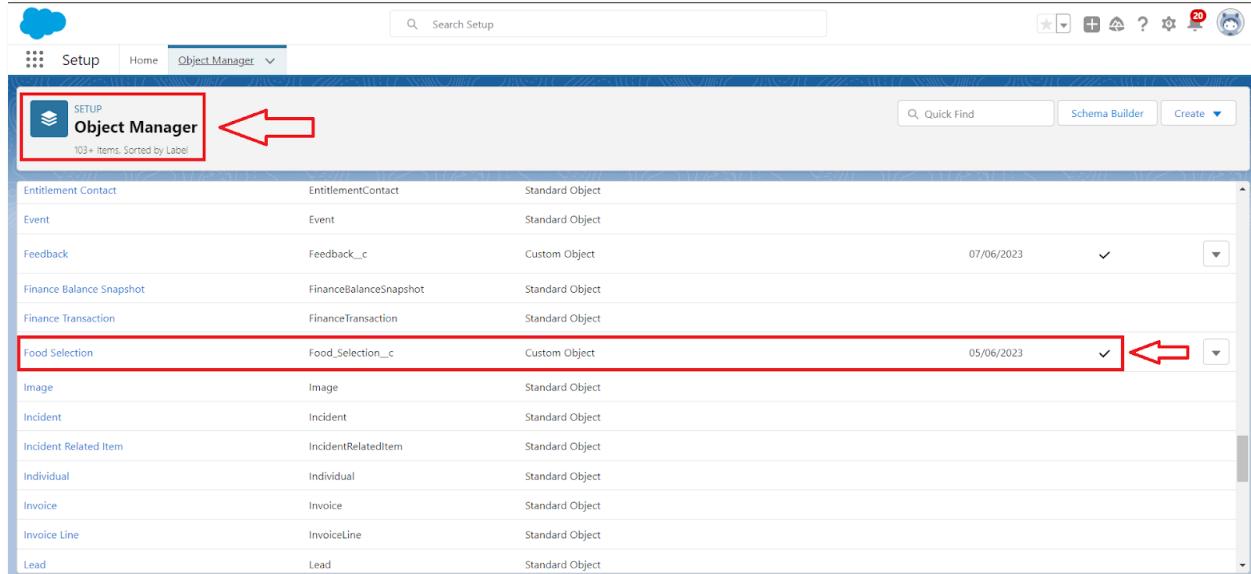
Need to use Field Dependency:

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

Picklist.

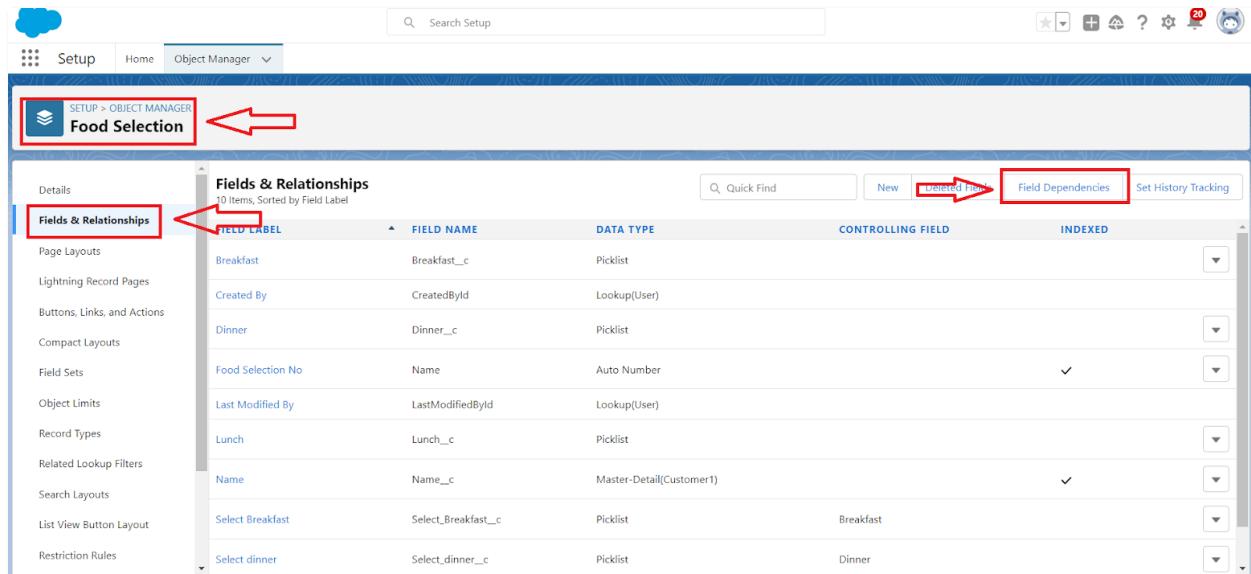
Create a Field Dependency on Breakfast and Select Breakfast Fields in Food Selection Object.

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



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A red box highlights the 'Object Manager' button in the top left, and a red arrow points to it from the left. Another red box highlights the 'Food Selection' row in the list, and a red arrow points to it from the right. The list includes various objects like Entitlement Contact, Event, Feedback, Finance Balance Snapshot, Finance Transaction, and Lead, along with their respective details such as Type, Last Modified Date, and Status.

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



The screenshot shows the 'Fields & Relationships' section for the 'Food Selection' object. A red box highlights the 'Food Selection' label in the top left, and a red arrow points to it from the left. Another red box highlights the 'Fields & Relationships' link in the sidebar, and a red arrow points to it from the left. A third red box highlights the 'Field Dependencies' button in the top right, and a red arrow points to it from the right. The main table lists fields like Breakfast, Created By, Dinner, etc., with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

3. Now Click on New Option

Food Selection Field Dependencies

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

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

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

New Field Dependency

Create a dependent relationship that causes the values in a picklist or multi-select picklist to be dynamically filtered based on the value selected by the user in another field.

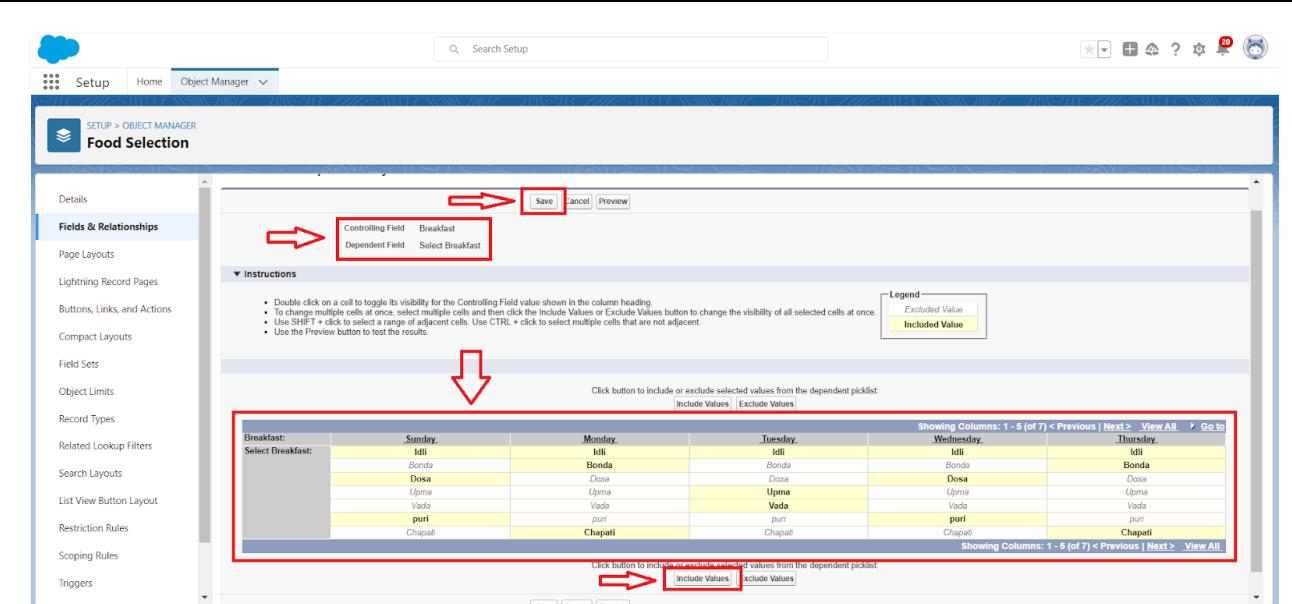
- The field that drives filtering is called the "controlling field." Standard and custom checkboxes and picklists with at least one and less than 300 values can be controlling fields.
- The field that has its values filtered is called the "dependent field." Custom picklists and multi-select picklists can be dependent fields.

Step 1. Select a controlling field and a dependent field. Click Continue when finished.

Step 2. On the following page, edit the filter rules that control the values that appear in the dependent field for each value in the controlling field.

Controlling Field	-None-	Continue	Cancel
Dependent Field	-None-		
Custom Fields			
Breakfast		Continue	Cancel
Dinner			
Lunch			
Select Breakfast			
Select dinner			
Select Lunch			

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



4. To create fields in an object:

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

5. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Select Lunch
 - Under Value - Enter values, with each value separated by a new line
1. Meals

2. Chicken biryani
 3. Veg biryani
 4. Veg fried rice
 5. Egg fried rice
 6. Chicken fried rice
 7. Curd rice
 8. Tomato rice
 9. Egg noodles
 10. Chicken Noodles
 11. Bhagara rice
- Select Checkbox Use First value as default Value
 - Click on Next > Next > Save and new.

To create a Field dependencies for Lunch and Select Lunch.

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

6. To create fields in an object:

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

7. To create fields in an object:

1. Go to setup > click on Object Manager > type object name(Food Selection) in the search bar > click on the object.
2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Select Dinner
 - Under Value - Enter values, with each value separated by a new line

1. Meals
2. Chicken biryani
3. Veg biryani
4. Veg fried rice
5. Egg fried rice
6. Chicken fried rice
7. Curd rice
8. Tomato rice
9. Egg noodles
10. Chicken Noodles
11. Bhagara rice
12. Select Checkbox Use First value as default Value
13. Click on Next > Next > Save and new.

To create a Field dependencies for Dinner and Select Dinner.

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

Activity 5 :

Creation of fields & relationship to an 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

SETUP > OBJECT MANAGER
Feedback

Fields & Relationships

Details

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Feedback NO	Name	Auto Number		
Food	Food__c	Picklist		
Housedleaning	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 “Lookup Relationship”

4. Click on Next

SETUP > OBJECT MANAGER
Feedback

Fields & Relationships

Details

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

Data Type

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

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

The relationship field is required on all detail records.

The ownership and sharing of a detail record are determined by the master record.

When a user defines the master object, all detail records are created.

You can create roll-up summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

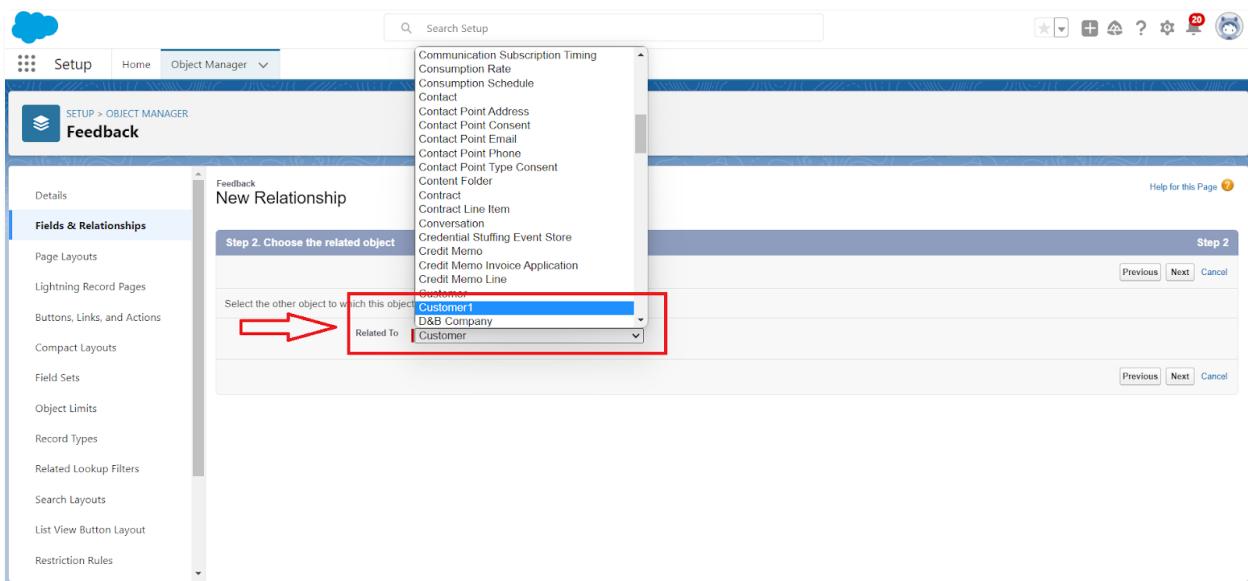
- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user defines the master object, all detail records are created.
- You can create roll-up summary fields on the master record to summarize the detail records.

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.

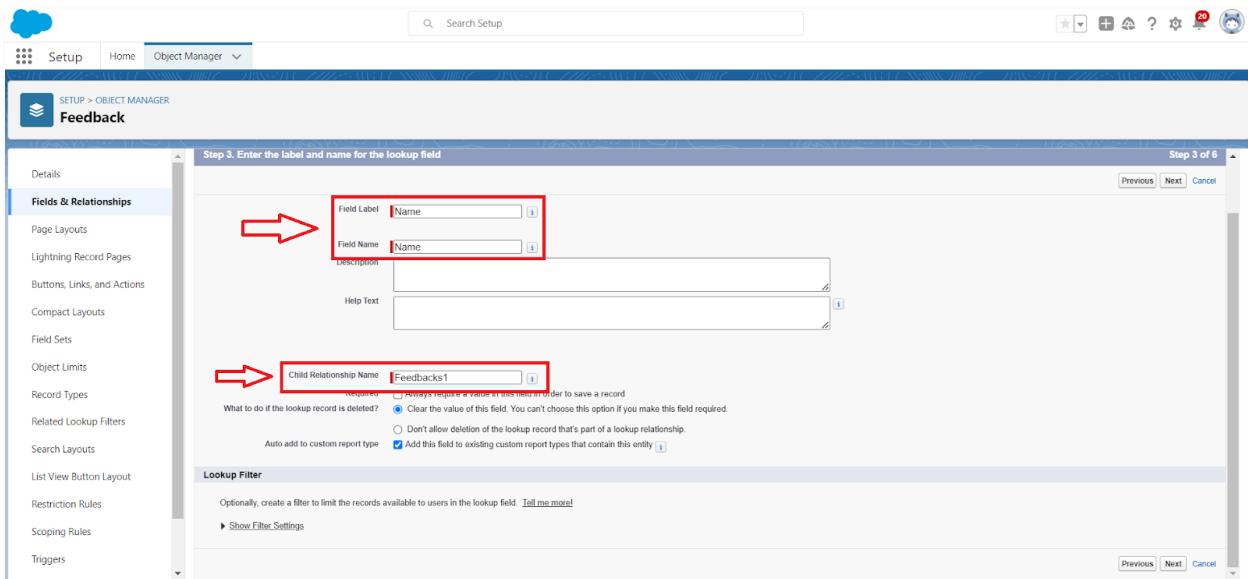
5. Click on the Related to drop down and Select the Customer1 object and click on

Next



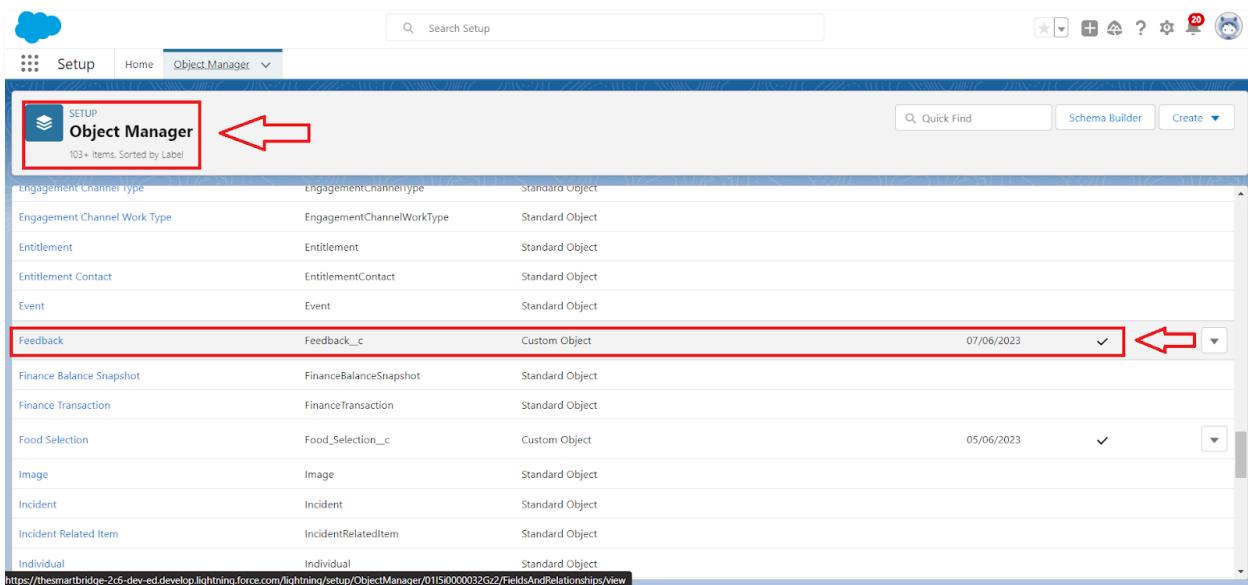
6. Fill the Above as following:

- 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:

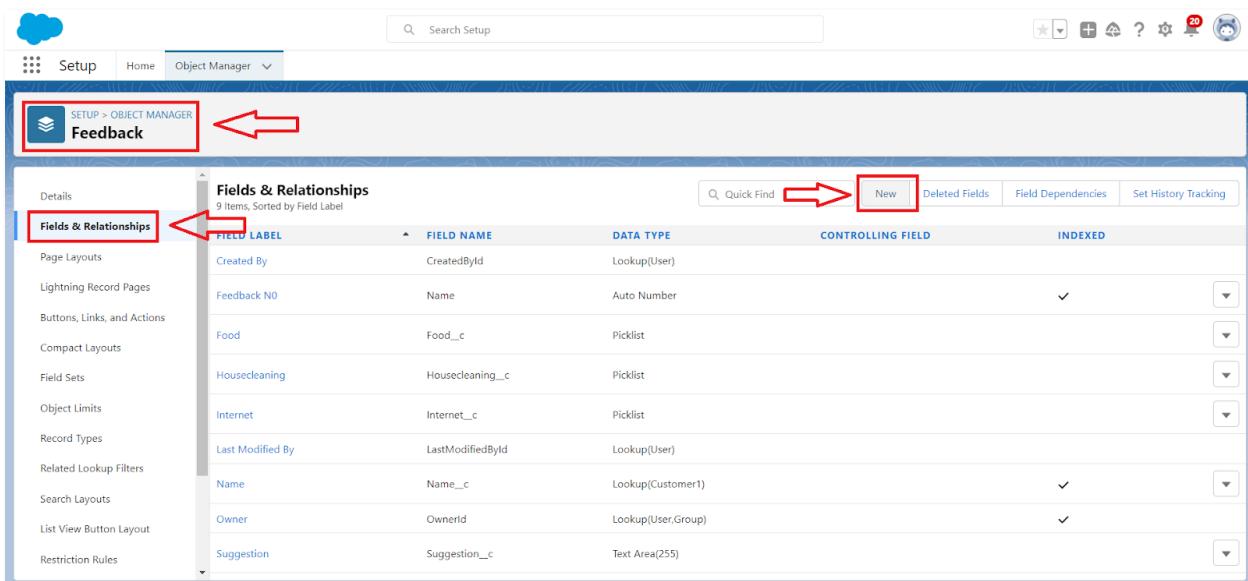
1. Go to setup > click on Object Manager > type object name(Feedback) in search bar > click on the object.



SETUP
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
Finance Balance Snapshot	FinanceBalanceSnapshot	Standard Object
Finance Transaction	FinanceTransaction	Standard Object
Food Selection	Food_Selection__c	Custom Object
Image	Image	Standard Object
Incident	Incident	Standard Object
Incident Related Item	IncidentRelatedItem	Standard Object
Individual	Individual	Standard Object

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



SETUP > OBJECT MANAGER
Feedback

Details
Fields & Relationships

Fields & Relationships
9 items. Sorted by Field Label

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

3. Select Data Type as a “Picklist”

Setup > OBJECT MANAGER

Feedback

Fields & Relationships

- Details
- 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

Picklist

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

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 multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

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

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

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

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

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

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

4. Click on Next

Setup > OBJECT MANAGER

Feedback

Fields & Relationships

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

Field Label: Roomcleaning

Values:

- Good
- Satisfaction
- Bad

Field Name: Roomcleaning

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes ('Text', 'Value'). Include numbers without quotes. Reference a field from a Custom Metadata Type record using \$CustomMetadataType__md RecordAPIName Field__s

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”

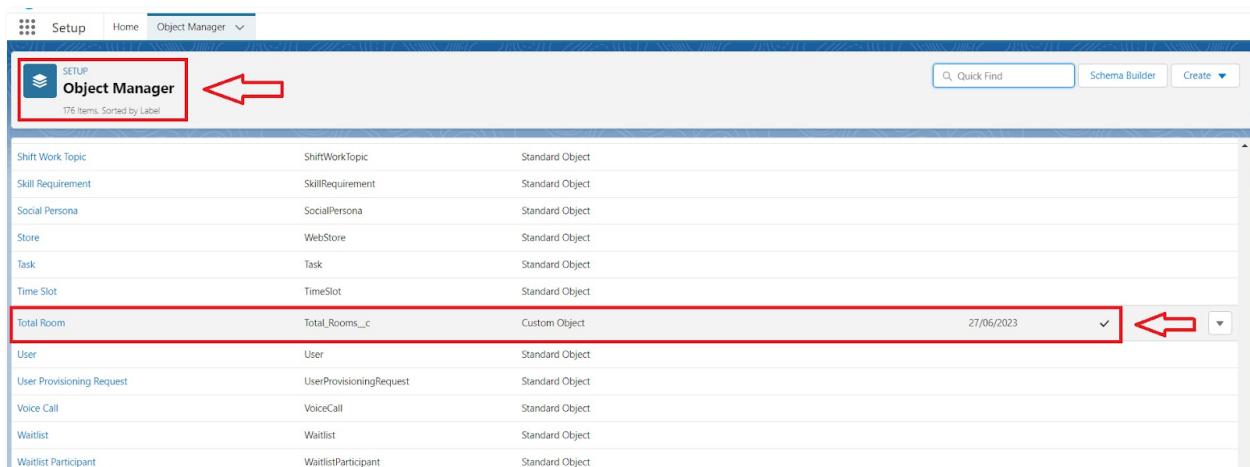
4. Click on Next
5. Fill the Above as following:
 - Field Label: Suggestion
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new.

Activity 6 :

Creation of fields for the Total Rooms object

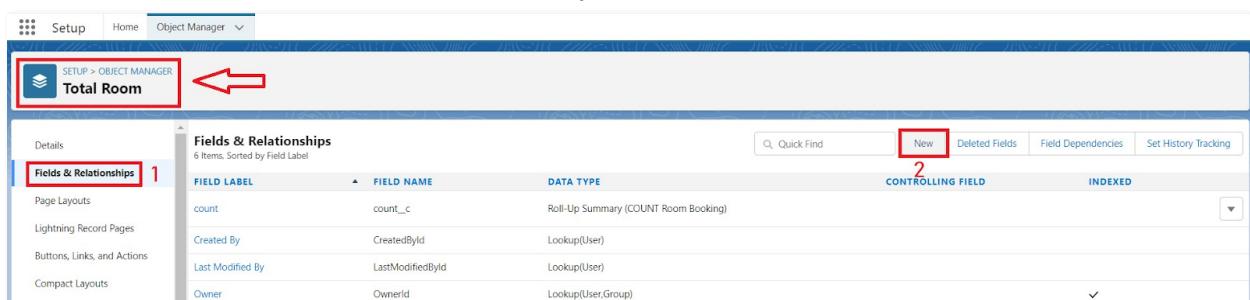
1. To create fields in an object:

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



The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for Setup, Home, and Object Manager. A red box highlights the 'Object Manager' tab. Below the tabs, a search bar contains the text 'Total Room'. A red box highlights the search result for 'Total Room', which is listed as a Custom Object. To the right of the object name, there is a date field set to '27/06/2023' and a dropdown menu. Red arrows point from the left towards the 'Object Manager' tab and from the right towards the date field.

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



The screenshot shows the 'Fields & Relationships' section for the 'Total Room' object. At the top, there is a breadcrumb trail 'SETUP > OBJECT MANAGER' followed by 'Total Room'. A red box highlights the 'Fields & Relationships' link in the sidebar. The main area displays a table of existing fields. A red box highlights the 'New' button at the top right of the table. Red numbers '1' and '2' are overlaid on the screenshot: '1' is next to the 'Fields & Relationships' link in the sidebar, and '2' is next to the 'New' button in the table header.

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

Step 1. Choose the field type

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

Data Type

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

Select one of the data types below.

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

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change. **3**

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.

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

Field Label **Rooms Available** **Field Name** **Rooms_Available** **4**

Auto add to custom report type Add this field to existing custom report types that contain this entity [\[i\]](#)

Formula Return Type

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

Select one of the data types below.

Calculate a boolean value
Example: [TODAY() = CloseDate]

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: [gross Margin = Amount - Cost_C]

Calculate a date, for example, by adding or subtracting days to other dates.
Example: [Reminder Date = CloseDate + 7]

Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: [Event Date = Start Date + Duration]

Calculate a numeric value
Example: [Fahrenheit = 1.8 * Celsius + 32] **5**

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

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

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

Decimal Places **0** **Example: 999** **6**

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

Simple Formula Advanced Formula

7

Insert Field
Rooms Available (Number) =
30 - Rooms_Booked__c

Insert Operator ▾

Functions
-- All Function Categories -- ▾
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN

Insert Selected Function

Check Syntax | No syntax errors in merge fields or functions. (Compiled size: 36 characters) **8**

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

TASK 6 - Validation Rule

Introduction :

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 :

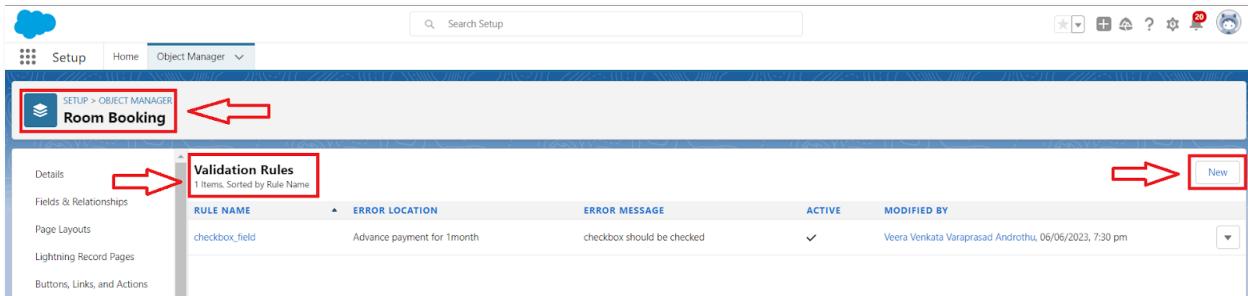
create a validation rule to an Room Booking Object

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

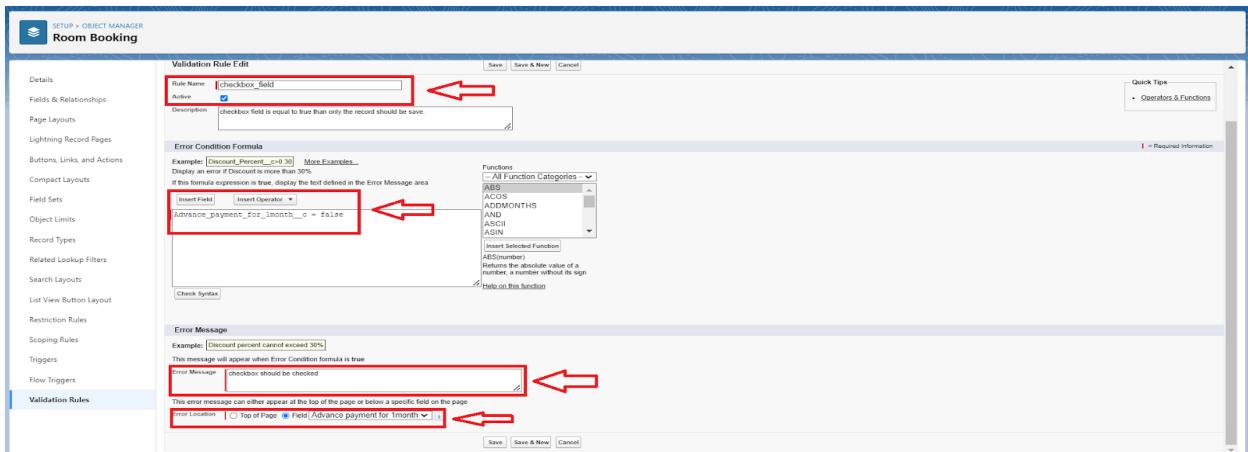
The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' button in the top-left corner, and a red arrow points to it. Another red box highlights the 'Room Booking' row in the list, and a red arrow points to the dropdown menu next to its last column. The list includes various objects like Resource Absence, Resource Preference, Return Order, etc.

Object Name	Label	Type	Last Modified
Resource Absence	ResourceAbsence	Standard Object	07/06/2023
Resource Preference	ResourcePreference	Standard Object	07/06/2023
Return Order	ReturnOrder	Standard Object	07/06/2023
Return Order Item Adjustment	ReturnOrderItemAdjustment	Standard Object	07/06/2023
Return Order Item Tax	ReturnOrderItemTax	Standard Object	07/06/2023
Return Order Line Item	ReturnOrderLineItem	Standard Object	07/06/2023
Room Booking	Room_Booking__c	Custom Object	07/06/2023
Scorecard	Scorecard	Standard Object	07/06/2023
Scorecard Association	ScorecardAssociation	Standard Object	07/06/2023
Scorecard Metric	ScorecardMetric	Standard Object	07/06/2023
Seller	Seller	Standard Object	07/06/2023
Service Appointment	ServiceAppointment	Standard Object	07/06/2023

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



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



- Click on save.

Activity 2 :

create a Another validation rule to an Room Booking Object

- Go to setup > click on Object Manager > type object name(Room Booking) in the search bar > click on the object.
- Now click on “Validation rule” at top > New.
- Enter Rule name “check in rule” and make the validation should be Active.

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 Rule Editor. Step 1 highlights the 'Rule Name' field containing 'check_in_rule'. Step 2 highlights the 'Error Condition Formula' field containing 'Check_in_c = False'. Step 3 highlights the 'Error Message' field containing 'Check box should be checked'. Step 4 highlights the 'Error Location' dropdown set to 'Field Check in'.

7. Click on save.

TASK 7 - Profile

Introduction :

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)

The screenshot shows the Salesforce Setup interface. In the top-left corner, there's a search bar with the placeholder 'Search Setup'. Below it, the 'Setup' tab is selected. On the left, a sidebar has 'Users' expanded, with 'Profiles' highlighted and a red arrow pointing to it. The main content area is titled 'Profiles' and shows a list of profiles. At the top of the list, there's a 'New Profile' button. The first profile listed is 'Standard User', which has a red arrow pointing to its 'Edit | Clone' link. Other profiles listed include 'Salesforce API Only', 'Silver Partner User', 'Solution Manager', and 'Salesforce Platform'.

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

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="Custom user"/>

Save **Cancel**

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

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.

The screenshot shows the 'Custom Object Permissions' section of the Salesforce Setup page. It displays two groups of objects with their respective permission settings:

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

Below the permissions, there are sections for 'Session Settings' and 'Password Policies'.

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.

	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"/>	

	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

Introduction :

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.

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with a search bar and links for 'Users', 'Sales', 'Service', and 'Case Teams'. Under 'Sales', 'Contact Roles on Contracts' and 'Contact Roles on Opportunities' are listed. Under 'Service', 'Case Team Roles' and 'Contact Roles on Cases' are listed. A message says ' Didn't find what you're looking for? Try using Global Search.' On the right, the main content area has a title 'Understanding Roles' and a 'Sample Role Hierarchy' diagram. The diagram shows a hierarchy from 'Executive Staff' (CEO, President, CFO, VP, Sales) down to 'Western Sales Director' (Western Sales Rep), 'Eastern Sales Director' (Eastern Sales Rep), 'International Sales Director' (International Sales Rep), and finally 'International Sales Rep' (Asian Sales Rep, European Sales Rep). Descriptions for each level are provided. At the bottom right of the main content area is a 'Set Up Roles' button, which is highlighted with a red box and a red arrow pointing to it.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. It displays a hierarchical tree of roles under 'Nick Enterprises'. The 'CEO' node is expanded, showing its children: 'HR', 'Manager', 'On Site Emp', and 'Remote Emp'. Each child node has an 'Edit | Del | Assign' button. Below the tree, there are buttons for 'Collapse All' and 'Expand All'. A red box highlights the 'Expand All' button. Another red box highlights the 'Add Role' button under the 'CEO' node.

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

The screenshot shows the 'Role Edit' page for a 'New Role'. The page title is 'Role Edit New Role'. It has a section titled 'Role Edit' with fields for 'Label' (containing 'Marketing') and 'Role Name' (containing 'Marketing'). Below these fields is a note 'This role reports to' followed by a dropdown menu set to 'CEO'. There's also a field 'Role Name as displayed on reports'. At the bottom are buttons for 'Save', 'Save & New', and 'Cancel'. A red box highlights the 'Label' field, another red box highlights the 'Role Name' field, and a red arrow points to the 'Save' button.

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. At the top, there's a 'SETUP' icon and the word 'Roles'. Below that, it says 'Role Edit' and 'New Role'. The main area has fields for 'Label' (containing 'Receptionist'), 'Role Name' (containing 'Receptionist'), 'This role reports to' (set to 'CEO'), and 'Role Name as displayed on reports' (empty). At the bottom, there are three buttons: 'Save', 'Save & New', and 'Cancel'. Red arrows point from the text descriptions to the corresponding fields and buttons on the screen.

4. Then click on Save.

TASK 9 - Users

Introduction :

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.

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

2. Fill in the fields

- First Name : sandeep
- Last Name : gujja
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.com
- Nick Name : Give a Nickname
- Role : CEO
- User licence : Salesforce
- Profiles : Custom user

The screenshot shows the 'New User' edit screen. It has two main sections: 'General Information' and 'User Details'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, and Nickname, all of which are highlighted with a red box and a red arrow pointing to them. The 'User Details' section contains dropdowns for Role (set to CEO), User License (set to Salesforce), and Profile (set to Custom user), also highlighted with a red box and a red arrow pointing to the Role dropdown.

3. save.

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

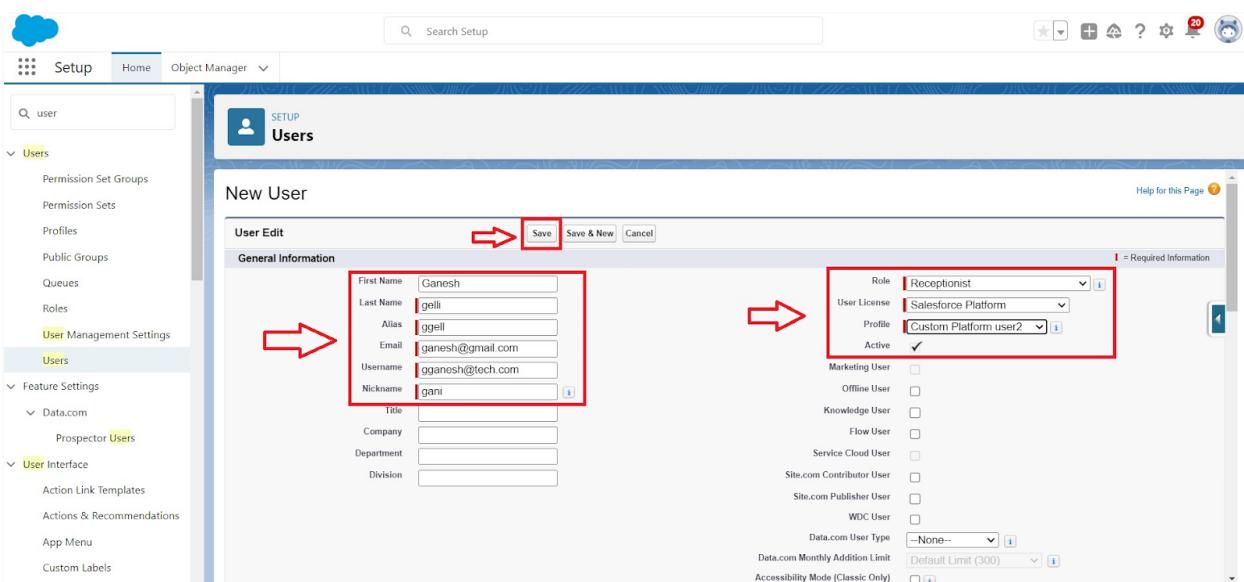
The screenshot shows the 'User Edit' page for a user named 'abhilash garapati'. The 'General Information' section is highlighted with a red box, containing fields for First Name ('Abhilash'), Last Name ('garapati'), Alias ('garara'), Email ('abhi@gmail.com'), Username ('gabhi@tech.com'), and Nickname ('abhi'). The 'Save' button is also highlighted with a red box. To the right, another red box highlights the 'Role' field set to 'Marketing', the 'User License' field set to 'Salesforce Platform', and the 'Profile' field set to 'Customer Platform user1'. The 'Active' checkbox is checked. A legend at the top right indicates that a red border around a field means it is required information.

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

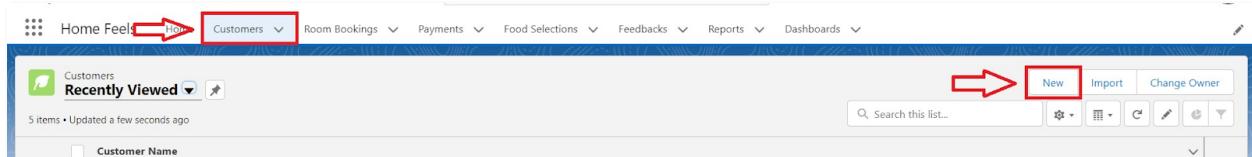


3. Save

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.

A screenshot of the 'New Customer1' form. The form is divided into sections: 'Information' and 'Owner'. The 'Information' section contains fields for 'Customer Name' (Text), 'Phone no' (9702874232), and 'Email id' (tech@gmail.com). The 'Owner' section contains fields for 'Permanent Address' (Hyderabad) and 'current Status' (Employee). A large red box highlights the entire 'Information' section. A red arrow points from the 'Information' section down to the 'Save' button at the bottom. The 'Save' button is also highlighted with a red box. A note at the top right indicates that fields marked with an asterisk (*) are required information.

- Click new and fill details & Save

Activity 2 :

View a Record (Customers)

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

The screenshot shows a CRM application interface. At the top, there is a navigation bar with various tabs: Co-Living, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Customers' tab is highlighted with a red box and an arrow. Below the navigation bar, there is a 'Recently Viewed' section for 'Customers' with a red box and arrow around the 'Customers' tab. A search bar and a toolbar with icons are also present. The main content area displays a list of customers under the heading 'Customer Name'. One record, 'sandeep', is selected and highlighted with a red box and arrow. The bottom part of the interface shows a detailed view of the 'sandeep' customer record. This view includes sections for 'Related' (Customer Name: sandeep, Phone no: 970526532, Email id: sandeep@gmail.com) and 'Details' (Owner: Veera Venkata Varaprasad Androthu, Permanent Address: Hyderabad, current Status: Employee). It also shows the 'Created By' information (Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm) and the 'Last Modified By' information (Veera Venkata Varaprasad Androthu, 07/06/2023, 4:33 pm). A large red box surrounds the entire 'Details' section.

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.

The screenshot shows the Salesforce Co-Living application interface. At the top, there's a navigation bar with tabs: Co-Living, Home, Customers (which is highlighted with a red box), Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. Below the navigation bar is a search bar with placeholder text 'Search this list...' and various filter and sort icons. The main area displays a list titled 'Recently Viewed' under the 'Customers' tab. The list contains five items, each with a checkbox and a customer name: 1. sandeep (highlighted with a red box), 2. Abhilash, 3. Ganesh, 4. suman, and 5. Prasad. In the bottom right corner of the list area, there are three buttons: 'Edit' (highlighted with a red box), 'Delete' (highlighted with a red box), and 'Change Owner'. A red box also highlights the 'Delete' button in the bottom right corner of the entire list view.

TASK 11 -Reports

Introduction :

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

Types of Reports in Salesforce

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

Activity 1 : Create Report

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

The screenshot shows the 'Reports' section of a software application. At the top, there is a navigation bar with icons for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is currently selected), and Dashboards. Below the navigation bar, there is a search bar labeled 'Search recent reports...' and a red box labeled '3' over the 'New Report' button. The main area displays a table of reports under the 'Recent' category. The columns include Report Name, Description, Folder, Created By, Created On, and Subscribed. Three specific reports are listed:

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

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

The screenshot shows the 'Create Report' dialog. On the left, there is a sidebar with a 'Category' section containing a list of report types: Recently Used, All (which is selected and highlighted in blue), Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets. A red box labeled '1' is over the 'All' button. To the right, there is a search bar labeled 'Select a Report Type' with the text 'customers' entered. A red box labeled '2' is over the search bar. Below the search bar, there is a table of report types with columns for 'Report Type Name', 'Category', and a dropdown arrow. One row in the table is highlighted with a red box and labeled '3'. This row contains the report type 'Customers with Room Bookings and Total Rooms' and its category 'Standard'. A red box labeled '4' is over the dropdown arrow for this row.

4. Customize your report
5. Add fields from left pane as shown below

The screenshot shows a report configuration interface with the following elements:

- REPORT** dropdown: Room booking report.
- Customer Name** filter field.
- Fields** pane:
 - Outline**: Groups, Subtotal, Total.
 - Columns**: Room No, Phone no, Email id, Permanent Address, current Status, Room sharing, # Advance payment for 1month, # AC - 3000, # Amount.
- Preview** pane: Shows a table of customer bookings with columns: Customer Name, Room No, Phone no, Email id, Permanent Address, current Status, Room sharing, Advance payment for 1month, AC - 3000, Amount. The table includes rows for RN-006 through RN-004, with various room sharing and payment details.
- Buttons** at the top right: Save (highlighted with a red arrow), Run, Close.
- Other controls**: Row Counts, Detail Rows, Subtotals, Grand Total.

6. 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

Introduction :

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

Activity 1 :

Create Dashboard

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

The screenshot shows the Co-Living application interface. At the top, there is a navigation bar with various tabs: Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports, and Dashboards. The 'Dashboards' tab is highlighted with a red box and the number '1'. Below the navigation bar is a search bar labeled 'Search...'. Underneath the search bar is a section titled 'Dashboards' with a 'Recent' tab and a note '2 items'. A table below lists dashboards with columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A red box highlights the 'New Dashboard' button at the top right of the dashboard list.

2. Give a Name and click on Create.

The screenshot shows a modal dialog box titled 'New Dashboard'. Inside the dialog, there is a field labeled 'Name' containing the text 'custom Dashboard', which is highlighted with a red box and an arrow. Below the name field is a 'Description' field, which is empty. Under the 'Description' field is a 'Folder' field containing 'Custom Dashboard', with a 'Select Folder' button next to it. At the bottom right of the dialog is a blue 'Create' button, which is also highlighted with a red box and an arrow.

3. Select add component.

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

The screenshot shows a modal dialog box titled 'Select Report'. On the left side of the dialog, there is a sidebar with sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'Folders' (Created by Me, Shared with Me, All Folders), and a 'Recent' section. The 'Recent' section contains a list of reports. One report, 'Room booking report Veera Venkata Varaprasad Androthu - 14-Jun-2023, 2:58 pm - custom report', is highlighted with a red box and an arrow. To the right of the sidebar is a main area titled 'Select Report' with a search bar and a 'Reports and Folders' dropdown. Below the search bar is a list of reports. The same 'Room booking report' is listed here, also highlighted with a red box and an arrow. At the bottom right of the dialog are two buttons: 'Cancel' and 'Select', both highlighted with red boxes and arrows.

Edit Component

Room booking report

Subtitle

Amount

Footer

Legend Position

Right

Component Theme

Light (Dashboard default)

Dark

Preview

Room booking report

Amount

Sum of Amount: ₹156k

Customer Name
Abhilash
Ganesh
Prasad
sandeep
suman

[View Report \(Room booking report\)](#)

Cancel
Update

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

Introduction :

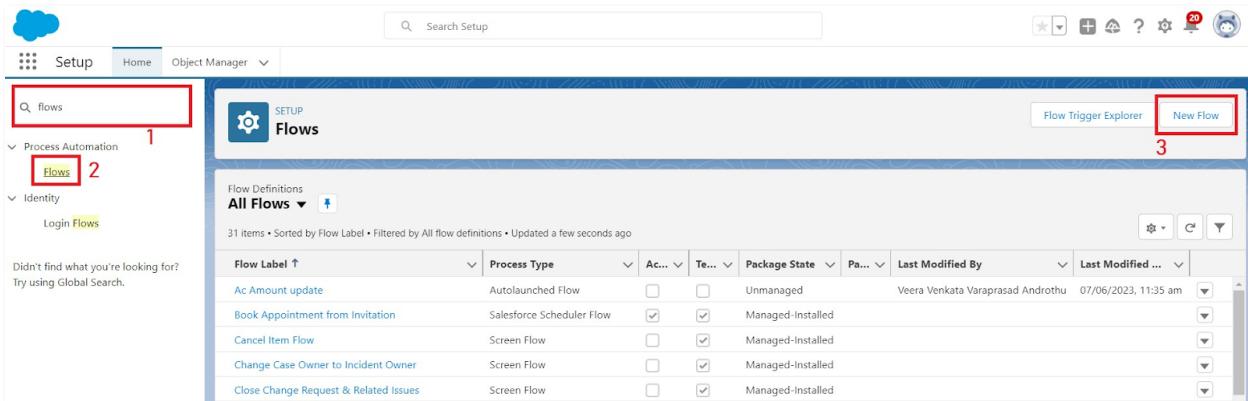
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

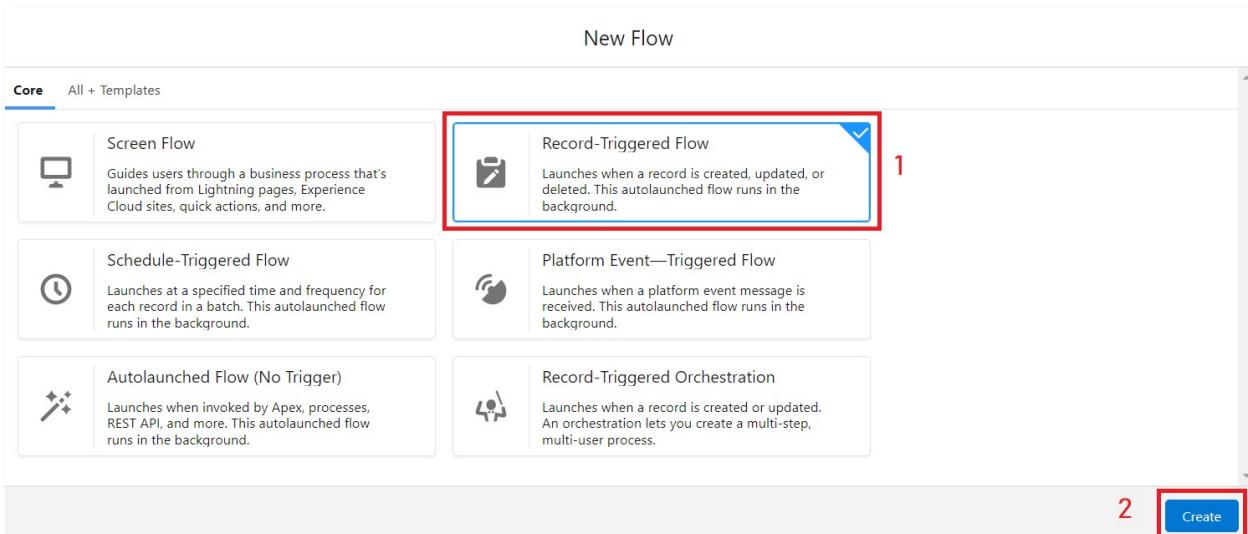
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

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.

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object
Room Booking

1

Configure Trigger

* Trigger the Flow When:

A record is created
 A record is updated
 A record is created or updated
 A record is deleted

2

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.

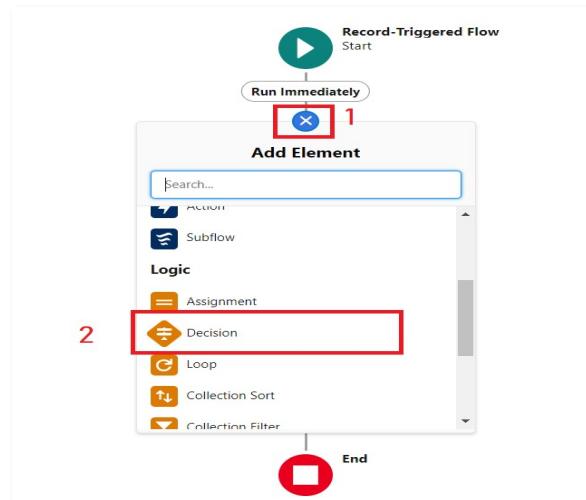
3

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

4

Cancel Done

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



7. Enter the Details Label: Field should be Update, API name: Gets Automatically

Generated.

8. Enter the Outcome Details Label: Single sharing, Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Single sharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select False.
 - Click on “+” Symbol In the Outcome Order.

New Decision

The screenshot shows the 'New Decision' dialog box. At the top, there are fields for 'Label' (Field Should be Update) and 'API Name' (Field_Should_be_Update). A red box highlights these fields. Below them is a 'Description' field containing '1'. The main area is titled 'Outcomes' with the sub-instruction: '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.' On the left, there's a 'OUTCOME ORDER' section with a '+' button (highlighted by a red box) and a 'Default Outcome' section with a 'Single Sharing' option selected (highlighted by a red box). To the right, there's an 'OUTCOME DETAILS' section with a 'Label' field ('Single Sharing') and an 'API Name' field ('Single_Sharing'). A red box highlights this section. Below it is a 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)' (highlighted by a red box). Underneath is a table for conditions, with two rows highlighted by red boxes:

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

A red box highlights the entire condition table. At the bottom right are 'Cancel' and 'Done' buttons.

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

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

OUTCOME ORDER 1 + 3

OUTCOME DETAILS 1

*Label Double sharing *Outcome API Name Double_sharing

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

Resource \$Record > Room sharing Operator Equals Value Double sharing

Resource \$Record > AC - 3000 Operator Equals Value False

Delete Outcome

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

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

OUTCOME ORDER 1 + 3

OUTCOME DETAILS 1

*Label Triple Sharing *Outcome API Name Triple_Sharing

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

Resource \$Record > Room sharing Operator Equals Value Triple sharing

Resource \$Record > AC - 3000 Operator Equals Value False

Delete Outcome

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

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

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

The screenshot shows the 'OUTCOME DETAILS' section of a configuration interface. A red box labeled '1' highlights the 'Label' field containing 'Single Ac'. Another red box labeled '2' highlights the 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)'. A third red box labeled '3' highlights the '+' button in the 'OUTCOME ORDER' sidebar, which is also labeled '3'.

* Label	* Outcome API Name
Single Ac	Single_Ac
Condition Requirements to Execute Outcome	
All Conditions Are Met (AND)	
Resource: \$Record > Room sharing X	
Operator	Equals
Value	single sharing
Resource: \$Record > AC - 3000 X	
Operator	Equals
Value	{!\$GlobalConstant.True}

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 DETAILS' section of a configuration interface. A red box labeled '1' highlights the 'Label' field containing 'Double Ac'. Another red box labeled '2' highlights the 'Condition Requirements to Execute Outcome' dropdown set to 'All Conditions Are Met (AND)'. A third red box labeled '3' highlights the '+' button in the 'OUTCOME ORDER' sidebar, which is also labeled '3'.

* Label	* Outcome API Name
Double Ac	Double_Ac
Condition Requirements to Execute Outcome	
All Conditions Are Met (AND)	
Resource: \$Record > Room sharing X	
Operator	Equals
Value	Double sharing
Resource: \$Record > AC - 3000 X	
Operator	Equals
Value	{!\$GlobalConstant.True}

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

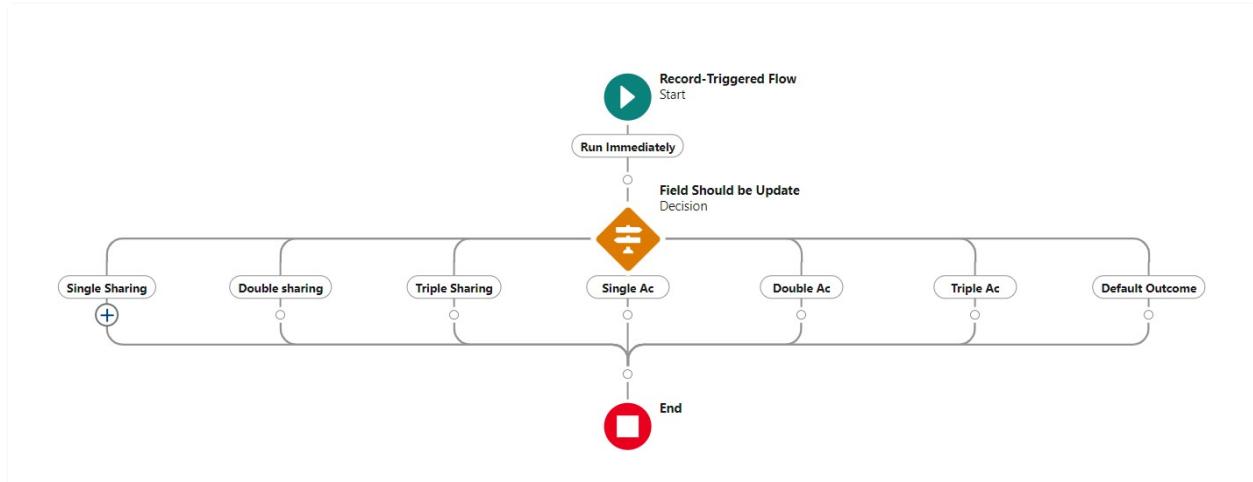
- Resource: Select Record.Room sharing.
- Operator: Select Equals.

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

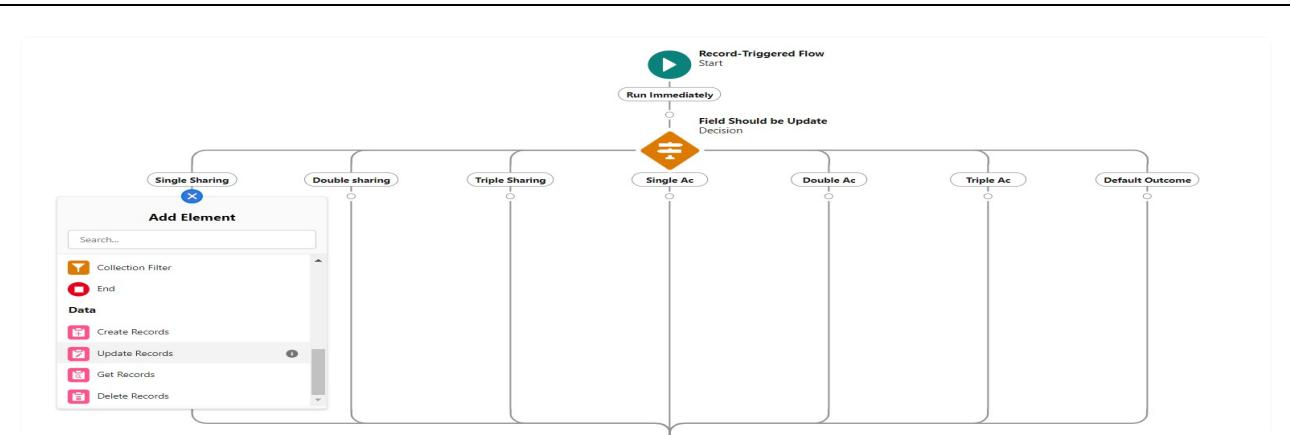
New Decision

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	
Single Sharing	*Label: Triple Ac	*Outcome API Name: Triple_Ac
Double sharing	Condition Requirements to Execute Outcome: All Conditions Are Met (AND)	
Triple Sharing		
Single Ac		
Double Ac	Resource: \$Record > Room sharing	Operator: Equals
Triple Ac	AND \$Record > AC - 3000	Value: Triple sharing
Default Outcome	Resource: \$Record > AC - 3000	
<input type="button" value="+ Add Condition"/> When to Execute Outcome <input checked="" type="radio"/> If the condition requirements are met <input type="radio"/> Only if the record that triggered the flow to run is updated to meet the condition requirements		
		<input type="button" value="Cancel"/> <input style="border: 2px solid red; color: red; background-color: white; padding: 2px 10px;" type="button" value="Done"/>



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



15. Enter the update records details

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

Edit Update Records

Update Salesforce records using values from the flow.

* Label

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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount_c

Value

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

Double

*API Name

Double

Description

* How to Find Records to Update and Set Their Values

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

 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

24000



+ 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

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

Set Filter Conditions

Condition Requirements to Update Record

None—Always Update Record

Set Field Values for the Room Booking Record

Field

Amount__c

Value

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

Double_ac1

* API Name

Double_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

30000

+ Add Field

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

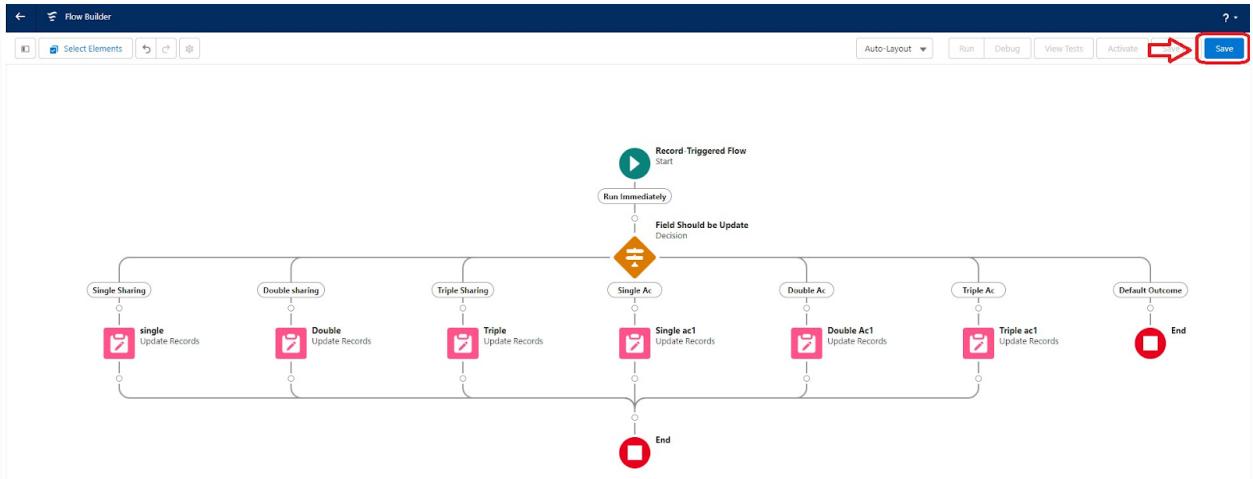


+ Add Field

Cancel

Done

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



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

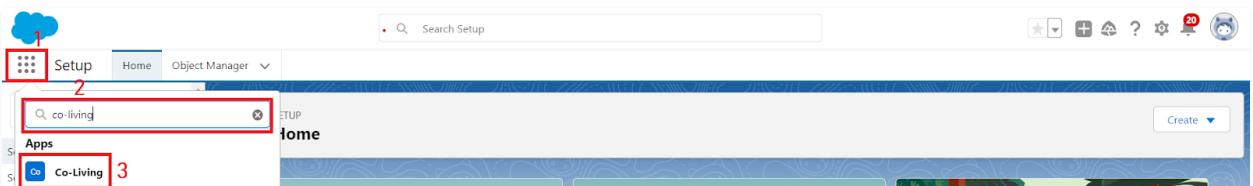
2

Cancel Save

Activity 2 :

Test the Flow

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



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

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

New Room Booking

* = Required Information

Information

Room No	AC - 3000
* Name	Prasad
* Room sharing	Double sharing - 12000
Amount	

Cancel Save & New Save

Room Booking RN-008

Related Details

Room No	AC - 3000
Name	Prasad
Room sharing	Double sharing - 12000
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.