

A CRM Application to Manage the Booking of Co-Living

Abstract: Our co-living space project fosters an inclusive community where individuals can live, work, and connect. The space offers a balance of private and communal areas, encouraging collaboration and reducing isolation. The application allows users to select AC rooms with multiple sharing options, choose daily special food items, make payments through various modes, and provide feedback on services like room cleaning, internet connection, and food.

Features and Functionality:

1. Customer Management

I. Customer Registration: Users can register themselves by providing personal details such as name, email, phone number, and address.

II. Customer Profile: A user profile will be created to store customer information, booking history, and payment details.

2. Room Booking

I. Room Selection: Users can browse and select from different AC rooms with multiple sharing options (e.g., single, double, triple sharing).

II. Room Availability: The application will display the availability of each room type in real-time.

III. Booking: Users can book a room by selecting the desired room type, checkin and check-out dates, and number of occupant

3. Food Services

I. Food Menu: A menu of special food items will be available for users to select from.

II. Daily Food Selection: Users can select food items for each day of their stay.

III. Food Preferences: Users can specify dietary restrictions or preferences (e.g., vegetarian, gluten-free).

4. Payment Management

I. Payment Options: Users can make payments using various modes such as credit/debit cards, net banking, or wallets.

II. Payment History: A record of all payments made by a user will be stored in their profile.

5. Feedback and Review

I. Service Feedback: Users can provide feedback on various services such as room cleaning, internet connection, food quality, and overall experience.

II. Rating System: Users can rate their experience on a scale of 1-5.

6. Reporting

I. Booking Reports: The application will generate reports on room bookings, occupancy rates, and revenue.

II. Customer Insights: The application will provide insights on customer behavior, preferences, and feedback.

7. Security and Access Control

I. User Authentication: Users will be authenticated using a secure login system.

II. Role-Based Access: Administrators will have access to manage bookings, customer data, and reports, while users will have access to their profiles and booking information.

8. Functionality

I. Search and Filter: Users can search for available rooms by date, room type, and sharing options.

II. Booking Confirmation: Once a booking is made, the user will receive a confirmation email with details of their booking.

III. Payment Reminders: The application will send reminders to users for pending payments.

IV. Feedback Notifications: The application will send notifications to administrators when a user provides feedback.

V. Reporting and Analytics: The application will generate reports and provide insights on customer behavior and preferences.

Milestone 1 - Introduction to Salesforce:

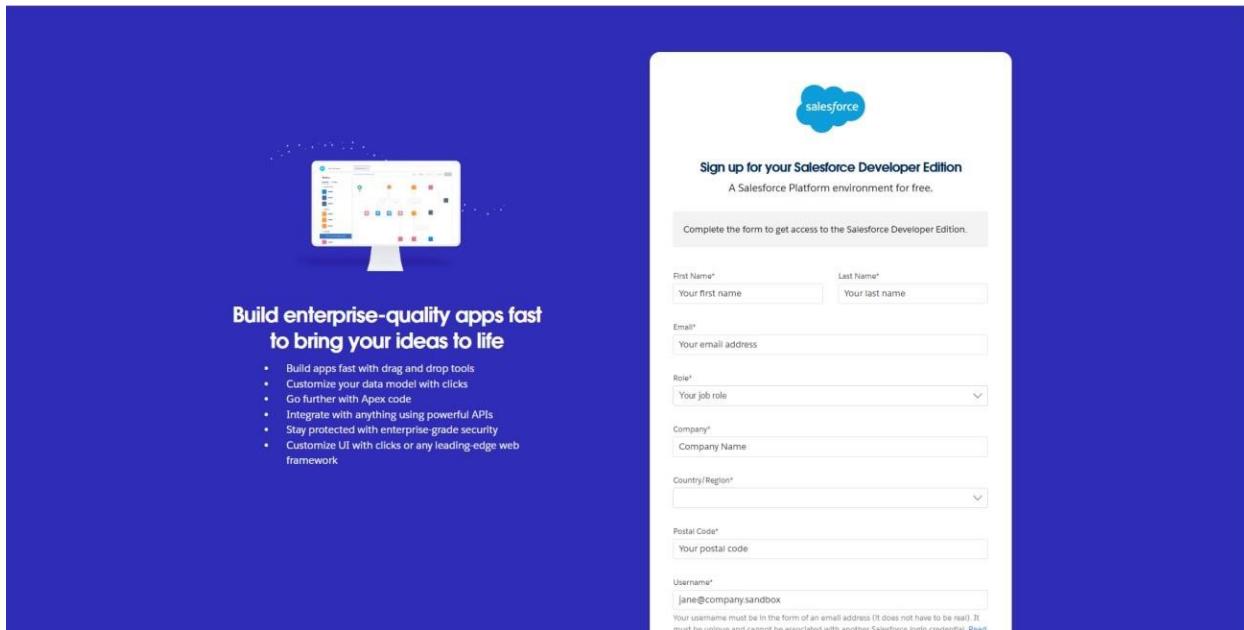
What is Salesforce?

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.

Activity 1: Creating Developer Account:

<https://developer.salesforce.com/signup>

<https://developer.salesforce.com/signup>



Activity 2: Account Activation:

NAME	TYPE	OBJECT
Buyer	Custom Object Definition	
First name	Custom Field Definition	Buyer

Activate your account by clicking the verify account which you received to your E-mail id.

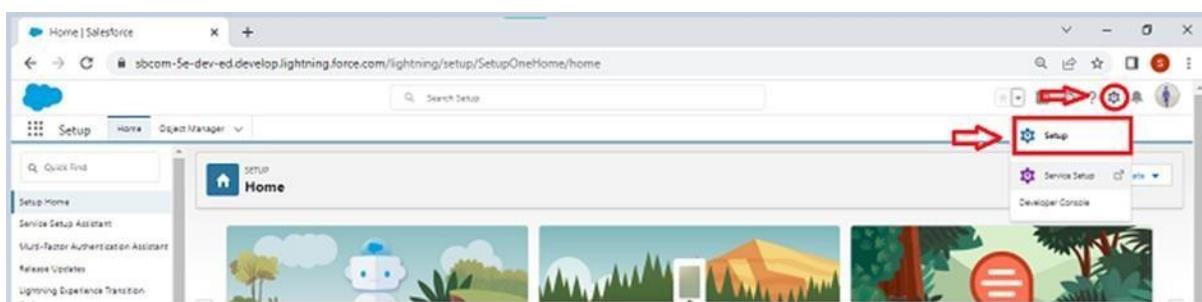
Milestone 2 – Object

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 objects created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a data-sharing structure.

To Navigate to Setup page:



Click on gear icon ? click setup.

To create an object:



1. From the setup page ? Click on Object Manager? Click on Create ? Click on Custom Object.
2. On the Custom object defining page:

New Custom Object | Salesforce

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and search results.

Label: Example: Account

Plural Label: Example: Accounts

Starts with: Account

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

Object Name: Example: Account

Description: (Empty)

Context-sensitive Help Setting: Open the standard Salesforce.com Help & Training window

Content Name: (None...)

Enter Record Name Label and Format:

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type: Text

Optional Features:

- Allow Reports
- Allow Activities
- Track Field History

3.

Enter the label name, and plural label name, click on Allow Reports, and Allow search.

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

- Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

Buttons:

Save Save & New Cancel

4. Click on Save.

Activity 1: Create a custom object for Total Rooms

To create an object:

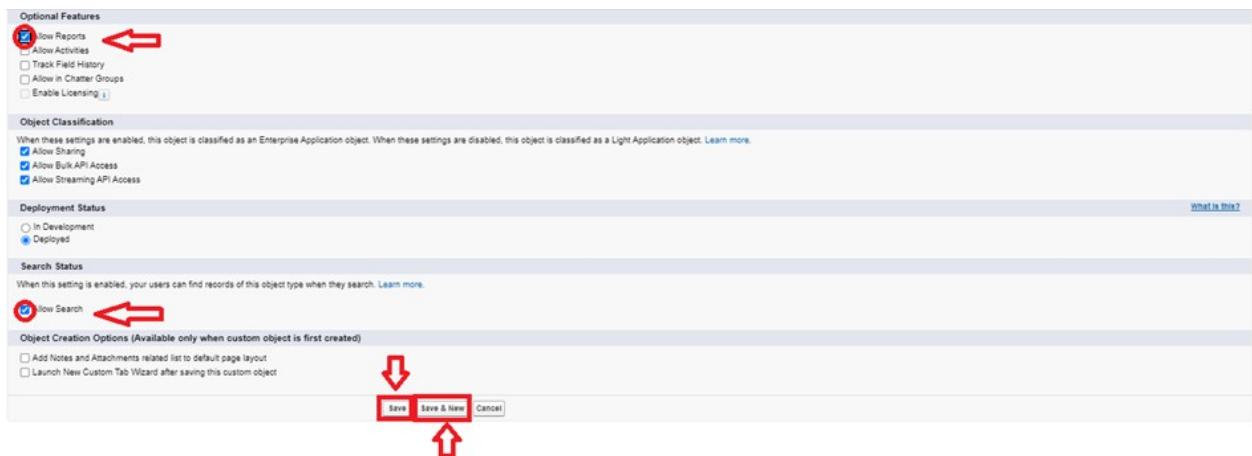
- From the setup page Click on Object Manager Click on Create Click on Custom Object.

- i. Enter the label name Supplier
- ii. Plural label name? Suppliers
- iii. Fillin the label as " Total Room ".
- iv. Fillin the plural label as " TotalRooms ".
- v. Record name: "Total No Of Rooms"
- vi. Select the data type as "Text".
- vii. Inthe Optional Featuressection, select AllowReports and Track Field History.
- viii. Inthe Deployment Status section, ensureDeployed is selected.
- ix. In the Search Status section, select Allow Search.

The screenshot shows the 'Custom Object Definition Edit' screen in the Salesforce Setup. At the top, there are 'Save', 'Save & New', and 'Cancel' buttons. Below that, the 'Custom Object Information' section includes fields for 'Label' (set to 'Total Room') and 'Plural Label' (set to 'Total Rooms'). A note says 'The singular and plural labels are used in tabs, name layouts, and reports.' There's also a checkbox for 'Starts with vowel sound'. The 'Object Name' field is highlighted with a red box and contains 'Total_Rooms' (2). Below it is a 'Description' text area. Under 'Context-Sensitive Help Setting', the radio button for 'Open the standard Salesforce.com Help & Training window' is selected. The 'Content Name' dropdown is set to 'None'. At the bottom, the 'Record Name' field is set to 'Total No Of Rooms' (3), and the 'Data Type' dropdown is set to 'Text'.

- x. In the Object CreationOptions section, select Add Notes and Attachments related list to default page layout.

- xi. Leave everything else as is, and click Save.



Create a custom object for Customer

SETUP > OBJECT MANAGER

Customer1

Details

Description

API Name
Customer1__c

Custom
✓

Singular Label
Customer1

Plural Label
Customers

Edit **Delete**

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Create a custom object for Room Booking

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

Room Booking

Details

Description

API Name: Room_Booking__c

Custom: ✓

Singular Label: Room Booking

Plural Label: Room Bookings

Enable Reports: ✓

Track Activities

Track Field History: ✓

Deployment Status: Deployed

Help Settings

Standard salesforce.com Help Window

Edit | **Delete**

Object Manager

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Create a custom object for Payment

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

Payment1

Details

Description

API Name: Payment1__c

Custom: ✓

Singular Label: Payment1

Plural Label: Payments

Enable Reports: ✓

Track Activities

Track Field History: ✓

Deployment Status: Deployed

Help Settings

Standard salesforce.com Help Window

Edit | **Delete**

Object Manager

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts

Create a custom object for Food Selection

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', a search bar, and various icons. The main content area is titled 'Food Selection' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', etc. The right panel displays the 'Details' section for the 'Food Selection' object, which includes fields such as API Name ('Food_Selection__c'), Singular Label ('Food Selection'), Plural Label ('Food Selections'), and various status checkboxes.

Create a custom object for Feedback

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', a search bar, and various icons. The main content area is titled 'Feedback' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists options like 'Fields & Relationships', 'Page Layouts', etc. The right panel displays the 'Details' section for the 'Feedback' object, which includes fields such as API Name ('Feedback__c'), Singular Label ('Feedback'), Plural Label ('Feedbacks'), and various status checkboxes.

Milestone 3 - Tabs

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.

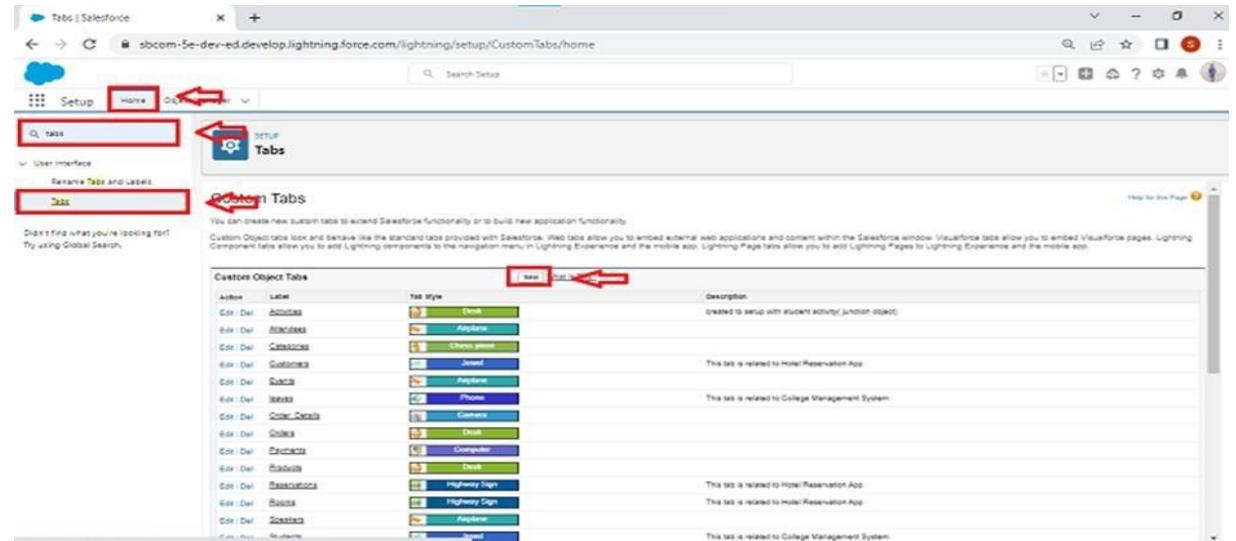
Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

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.

3. Next (Add to profilespage) keep it as default
4. Next (Add to CustomApp) keep it asdefault & Save.

**Create a
Tab for
Custom
ers To
createa
Tab:(Cust
omers)**

1. Go to setup page > type Tabs in Quick Find bar > click on tabs >

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.

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.

Create a Tabs For Remaining Objects

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

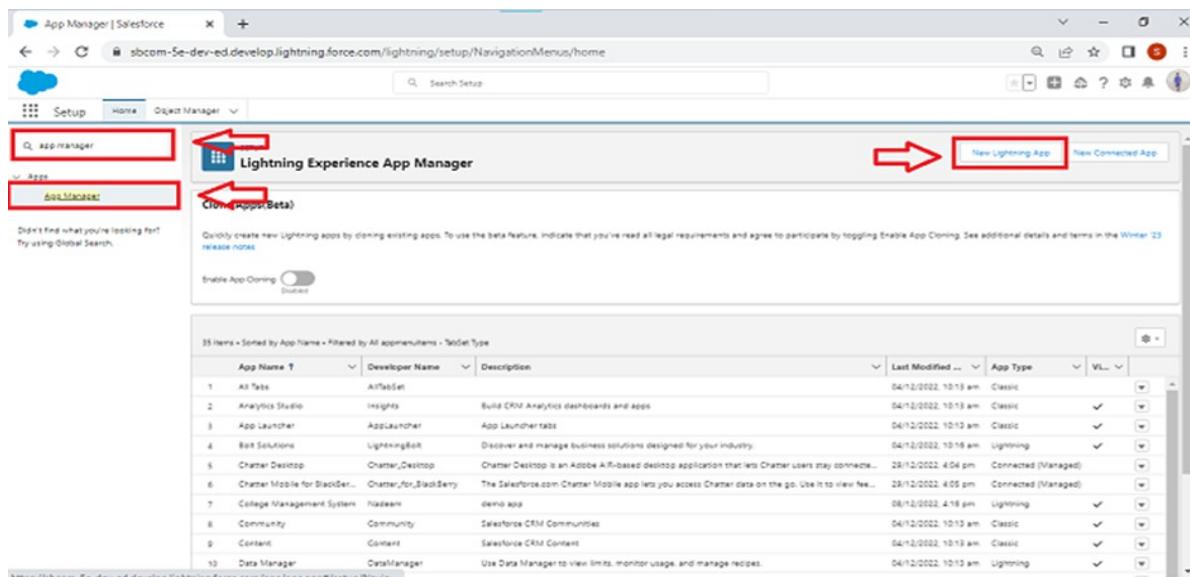
Milestone 4 - The Lightning App

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

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

Activity 1: To create a lightning app page:

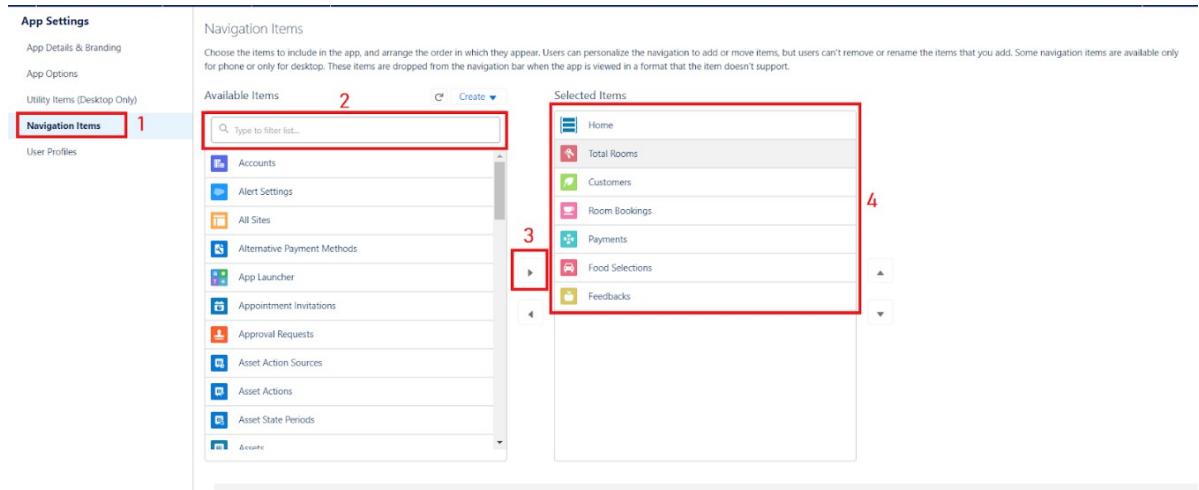
1. Go to setup page > search “app manager” in quick find > select “app manager” > click on New lightning App.



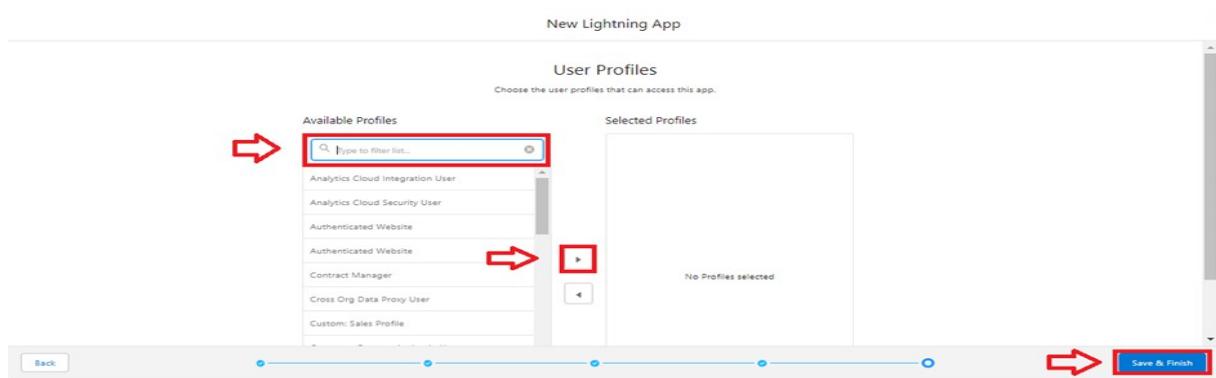
2. Fill the app name in app details and branding > Next > (App optionpage) keep it as default > Next

> (Utility Items) keep it as default > Next.

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



4. To Add User Profiles:



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

Milestone 5 – Fields

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 standard tasks. 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,

- ? CreatedBy
- ? Owner
- ? Last Modified
- ? Field Made During object Creation

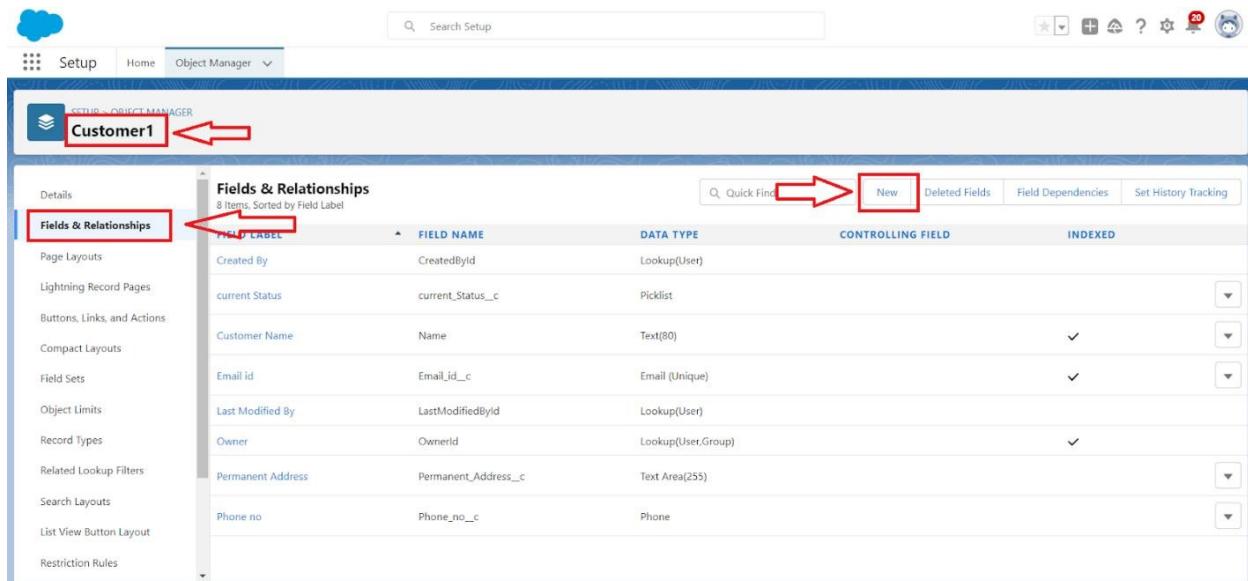
Custom Fields:

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:

- a. Go to setup > click on Object Manager > type objectname(Customer1) in searchbar > click on the object.



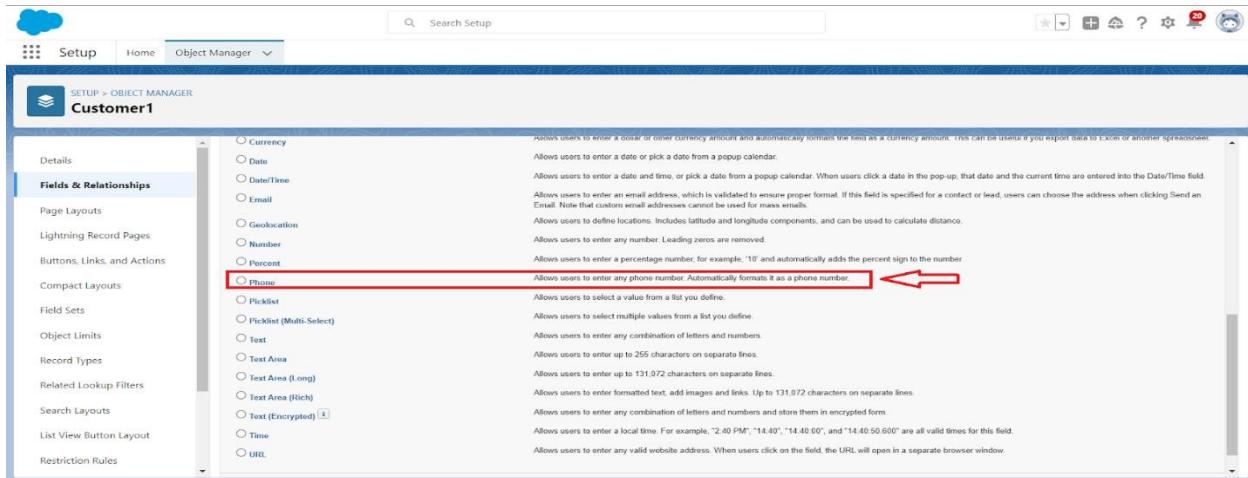
The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup' and 'Object Manager'. Below it, the title bar says 'Customer1'. On the left, a sidebar lists various object settings like 'Page Layouts', 'Lightning Record Pages', etc. The main area is titled 'Fields & Relationships' and contains a table of existing fields. A red arrow points from the 'Customer1' title bar to the 'Customer1' object name in the title bar. Another red arrow points from the 'Fields & Relationships' sidebar to the 'Fields & Relationships' section in the main table. A third red arrow points from the 'New' button in the top right of the table to the 'New' button in the toolbar above the table.

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		

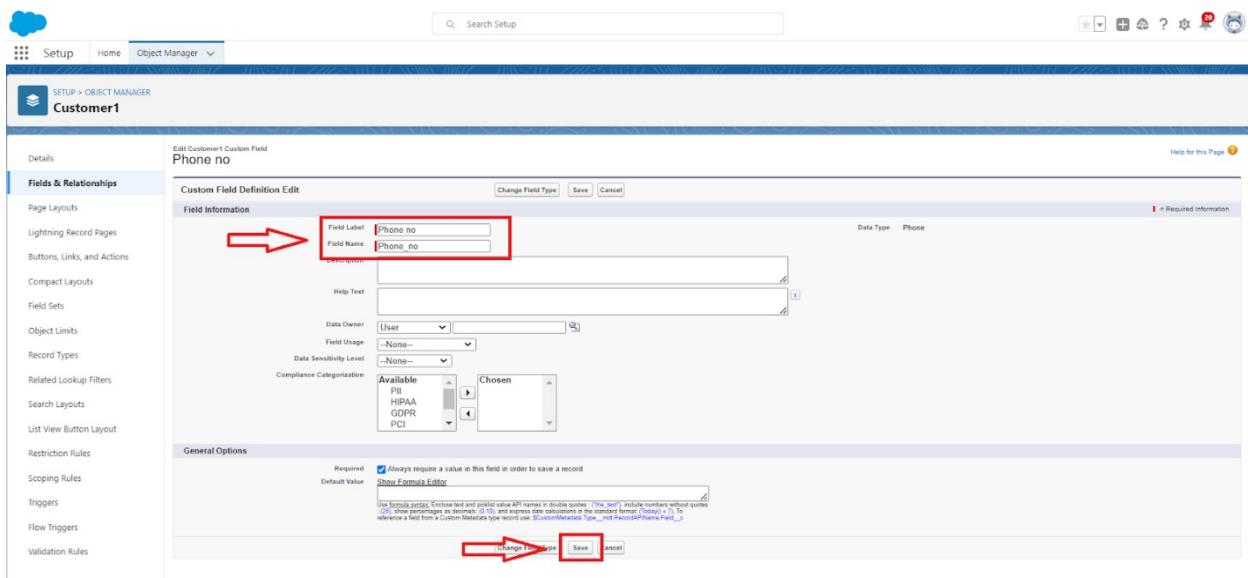
b.

Now click on "Fields & Relationships" > New

- c. Select Data Type as a "Phone"



d. Click on next



e. Fill the Above as following:

- i. Field Label:Phone no
- ii. Field Name : gets auto generated
- iii. Click on Next > Next > Save and new.

2. To create anotherfields in an object:

- a. Go to setup > click on Object Manager> type objectname(Customer1) in searchbar > click on the object.
- b. Now click on “Fields & Relationships” > New
- c. Select Data type asa “Email” and Clickon Next
- d. 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:

- a. Go to setup > click on Object Manager > type objectname(Customer1) in searchbar > click on the object.
- b. Now click on “Fields & Relationships” ? New
- c. Select Data type as a “Text Area” and Click on Next
- d. Fill the Above as following:
 - Field Label: PermanentAddress
 - Field Name : It's gets auto generated
 - Click on Next > Next > Save and new.

4. To create another fields in an object:

- a. Go to setup > click on Object Manager > type objectname(Customer1) in searchbar > click on the object.
- b. Now click on “Fields & Relationships” > New
- c. Select Data type as a “Picklist” and Click on Next

d. Fill
 the
 Abo
 ve
 as
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 owi
 ng:
 Fie
 ld
 Lab
 el:
 Cur
 rent
 Stat
 us

Value - Select enter values with each value separated by a new line

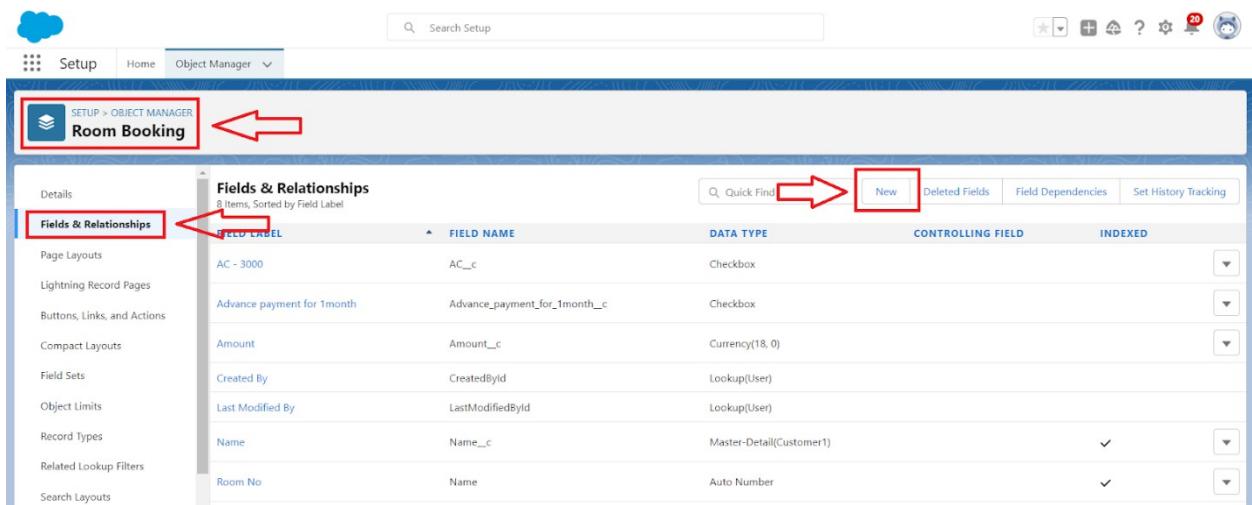
- Student
- Employee

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

Creation of fields for the Room Booking object

1. To create fields in an object:

- Go to setup > click on Object Manager > type objectname(Room Booking) in the searchbar > click on the object.



The screenshot shows the Salesforce Object Manager page for the 'Room Booking' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'Fields & Relationships' section for 'Room Booking'. A red arrow points from the 'New' button at the top right of the table to the 'New' button in the top right corner of the page header. Another red arrow points from the 'Fields & Relationships' link in the left sidebar to the 'Fields & Relationships' section in the main content area. The table lists various fields with their labels, names, data types, controlling fields, and indexing status.

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	✓	▼

b.

Now click on "Fields& Relationships" > New

- Select Data Type as a "Picklist"
- Click on Next

SETUP > OBJECT MANAGER
Room Booking

Step 2. Enter the details Step 2 of 4

Details Fields & Relationships

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

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

Field Name Room_Sharing 3

Description

Help Text

Required Always require a value in this field in order to save a record 3

Auto add to custom report type Add this field to existing custom report types that contain this entity 3

Default Value Show Formula Editor

Use formula editor. Choose text and picklist value API names in double quotes (""). The "soft" mode includes numbers without quotes. Use formula editor. Choose text and picklist value API names in double quotes (""). The "soft" mode includes numbers without quotes. To reference a field from a Custom Metadata type record use {{CustomMetadataType__mdt__RecordName__Field}}.

- a. Fill the Above as following:
 - i. Field Label: Room Sharing
 - ii. Value - Select entervalues with each value separated by a new line
1. Single sharing
2. Double sharing
3. Triple sharing
 - a. Select required
 - b. Click on Next > Next > Save and new.

2. To Create a Fields &Relationship to an Room BookingObject

To create fields &relationship to an object:

SETUP Object Manager 153 items. Sorted by Label

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

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

SETUP > OBJECT MANAGER
Room Booking

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 “Master-detail Relationship”

SETUP > OBJECT MANAGER
Room Booking

Fields & Relationships

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

Data Type

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

Master-Detail Relationship

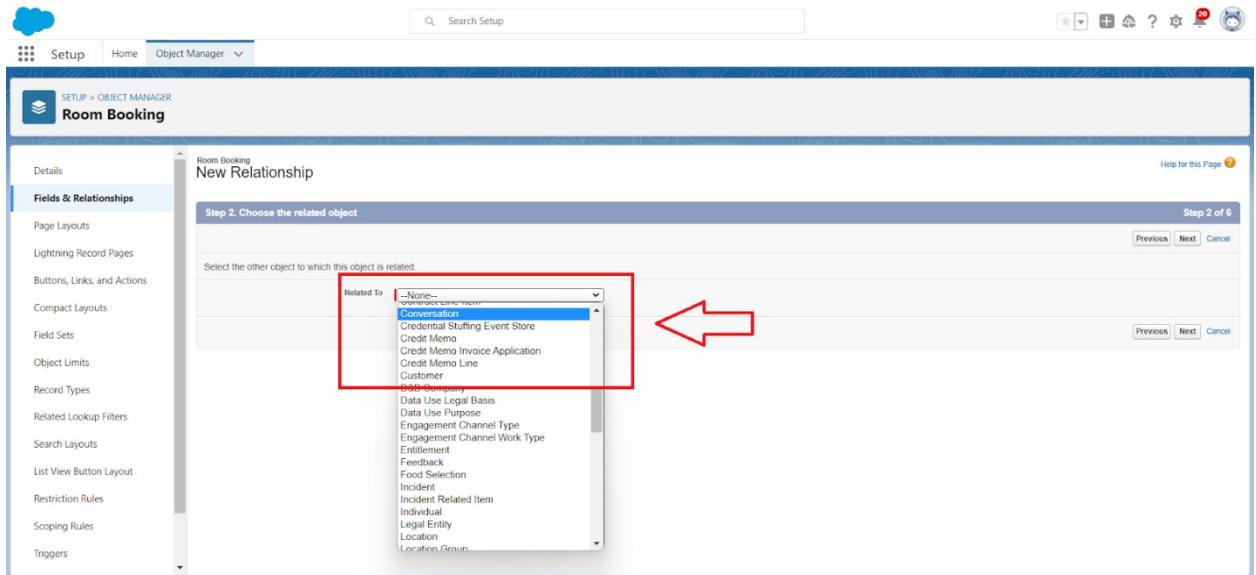
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

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

4.

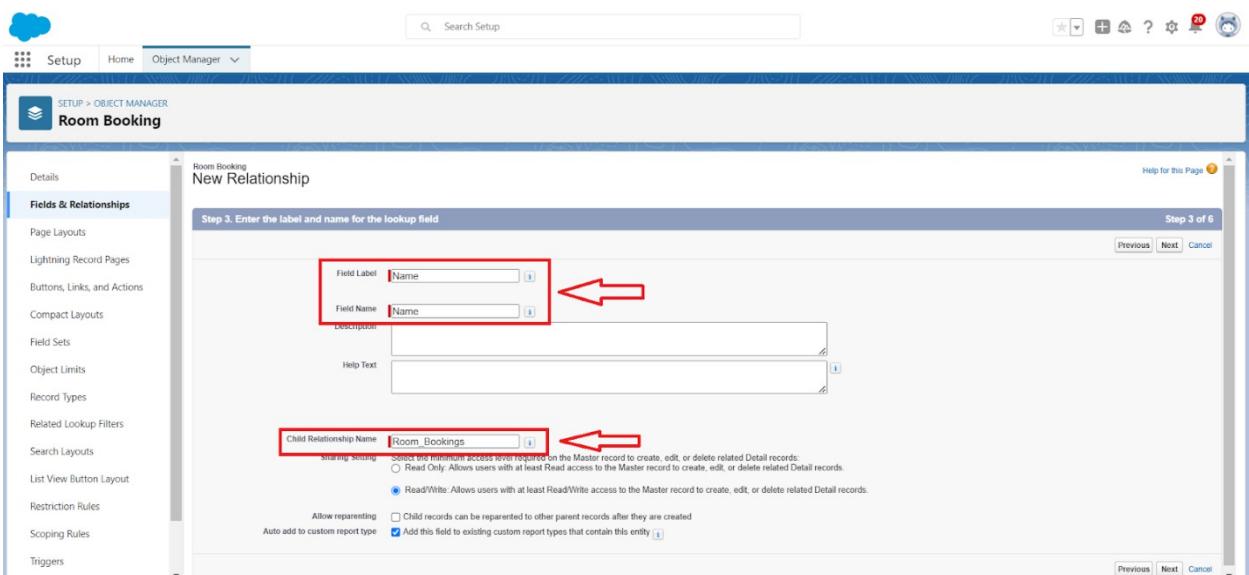
Click on Next

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



6. Fill the Above as following:

a. Change the FieldLabel: Name



b.

Field Name : It's gets auto generated

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

3. To create fields in an object:

- Go to setup > click on Object Manager> type objectname(Room Booking) in the searchbar > click on the object.
- Now click on “Fields & Relationships” > New

- c. Select Data Type as a “Checkbox”
 - d. Click on Next
 - e. 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:**
- a. Go to setup > click on Object Manager> type objectname(Room Booking) in the searchbar > click on the object.
 - b. Now click on “Fields & Relationships” > New
 - c. Select Data Type as a “Checkbox”
 - d. Click on Next
 - e. Fill the Above as following:
 - Field Label: AdvancePayment for 1 Month
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new
- 5. To create fields in an object:**
- a. Go to setup ? click on Object Manager? type object name(Room Booking)in the search bar ? click on the object.
 - b. Now click on “Fields & Relationships” ? New
 - c. Select Data Type as a “Currency”
 - d. Click on Next
 - e. 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 objectname(Room Booking) in the searchbar > 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 Relatedto drop down and Selectthe “Total Rooms” object and click on Next

- a. Fill the Above as following:
 - b. Change the FieldLabel: Total No Of Rooms
 - c. Field Name :It's gets auto generated
 - d. Click on Next > Next > Save and new.
7. **To Create a Rollup SummaryField in “TotalRoom Object”**
1. After Creatingthe Master- DetailRelationship Than Only you can create the Rollup Summary
 2. Goto 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-upSummary” and Click on Next
 - a. Fill the Above as following:
 - b. Field Label: Rooms Booked
 - c. Field Name :It's gets auto generated
 - d. Click on Next
 5. Select the Room Bookingsin the Summarized Object

Total Room
New Custom Field

Help for this Page

Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object	Total Room
Summarized Object	Room Bookings <input type="button" value="▼"/>

Select Roll-Up Type

COUNT SUM MIN MAX

Field to Aggregate:

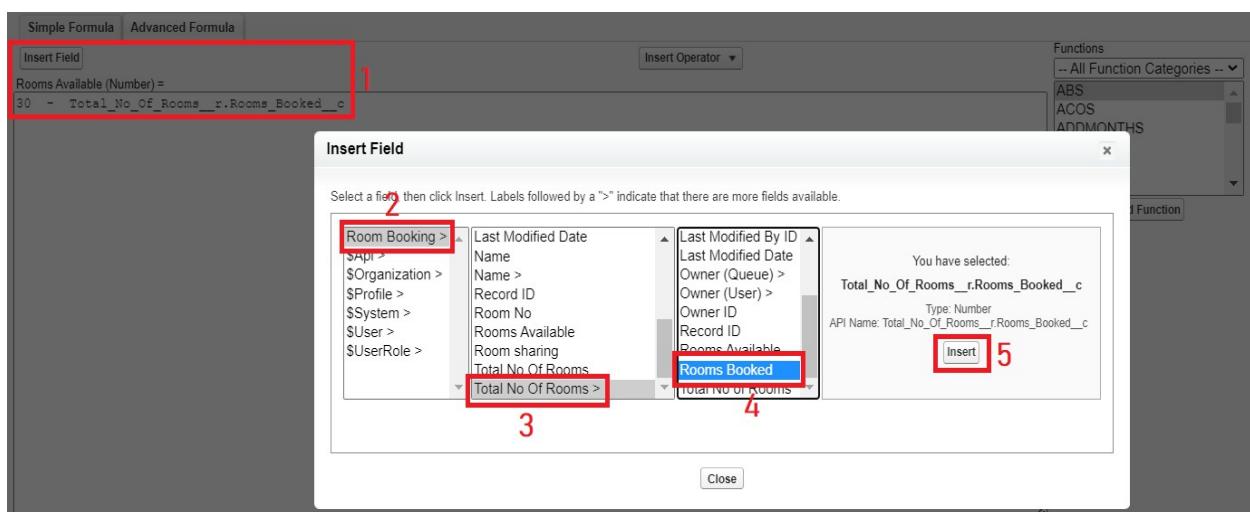
Filter Criteria

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

Previous Next Cancel

6. Select the count Radio button in the select Roll-upType
7. Click on Next > Next > Save and new
8. **To create fieldsin an object:**
 1. Go to setup > click on Object Manager> type objectname(Rooms Booking) in the searchbar > click on the object.
 2. Now click on “Fields & Relationships” > New
 3. Select Data type asa “Formula” and Click on Next

4. Fill the Above as following:
- Field Label: Rooms Available
 - Field Name : It's gets auto generated
 - Select the FormulaReturn Type as "Number"
 - Select the Decimalplaces as "0" and Clickon 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 selectthe Total No Of Roomsin 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
f. Click on Next > Next > Save and new.

9. To create fieldsin an object:

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

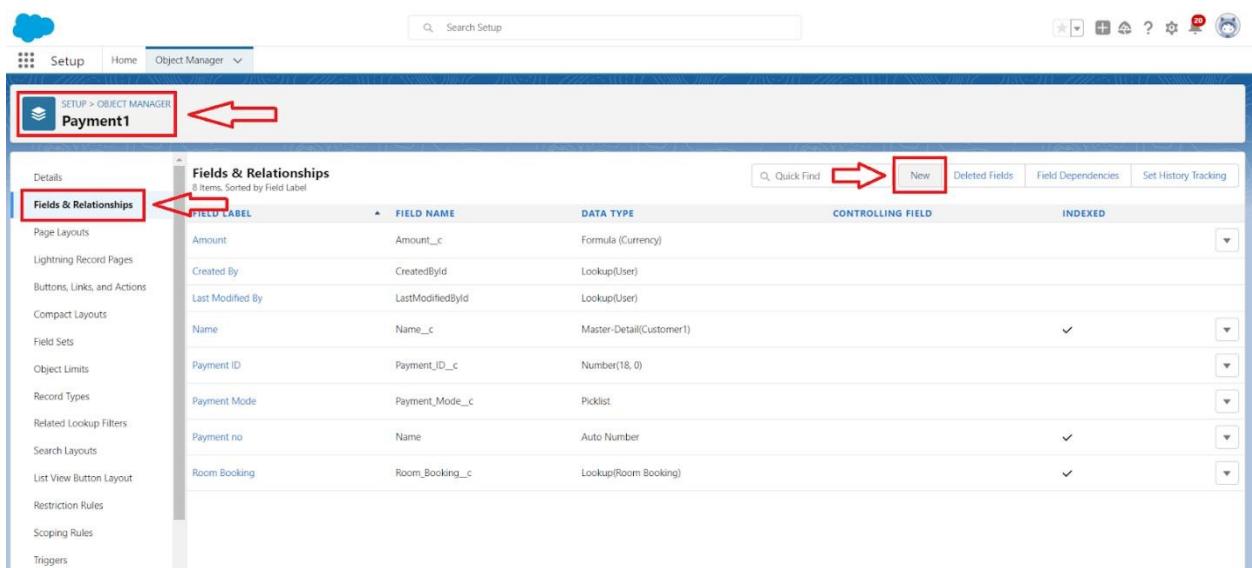
10. To create fieldsin an object:

1. Go to setup > click on Object Manager > type objectname(Room Booking) in the searchbar > 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:
 - a. Field Label: Check Out
 - b. Field Name :It's gets auto generated
 - c. Click on Next > Next > Save and new

Creation of Fields& Relationship for Payment1 Object

1. To create fields & relationship to an object:

- a. Go to setup > click on ObjectManager > type object name(Payment1) in the search bar > click on the object.



The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. Below the navigation is a breadcrumb trail: 'SETUP > OBJECT MANAGER' followed by 'Payment1'. A red arrow points from the text 'Payment1' to the breadcrumb. On the left, a sidebar lists various setup categories like Details, Page Layouts, Lightning Record Pages, etc., with 'Fields & Relationships' highlighted and a red arrow pointing to it. The main content area is titled 'Fields & Relationships' with a sub-header '8 items. Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are:

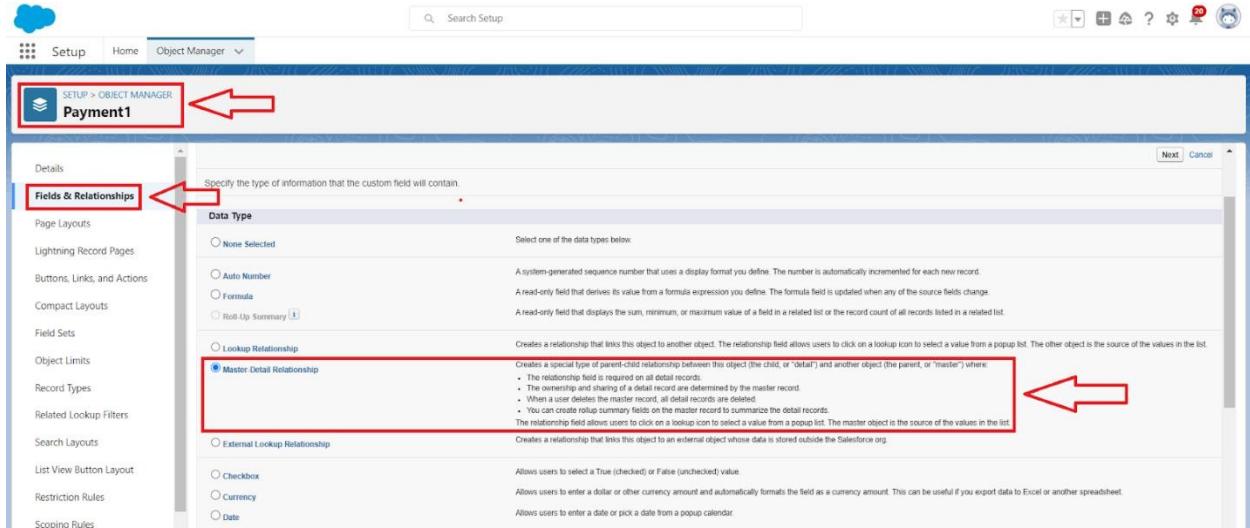
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Formula (Currency)		
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Name	Name_c	Master-Detail(Customer1)		
Payment ID	Payment_ID_c	Number(18, 0)		
Payment Mode	Payment_Mode_c	Picklist		
Payment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

A red arrow points to the 'New' button at the top right of the table header.

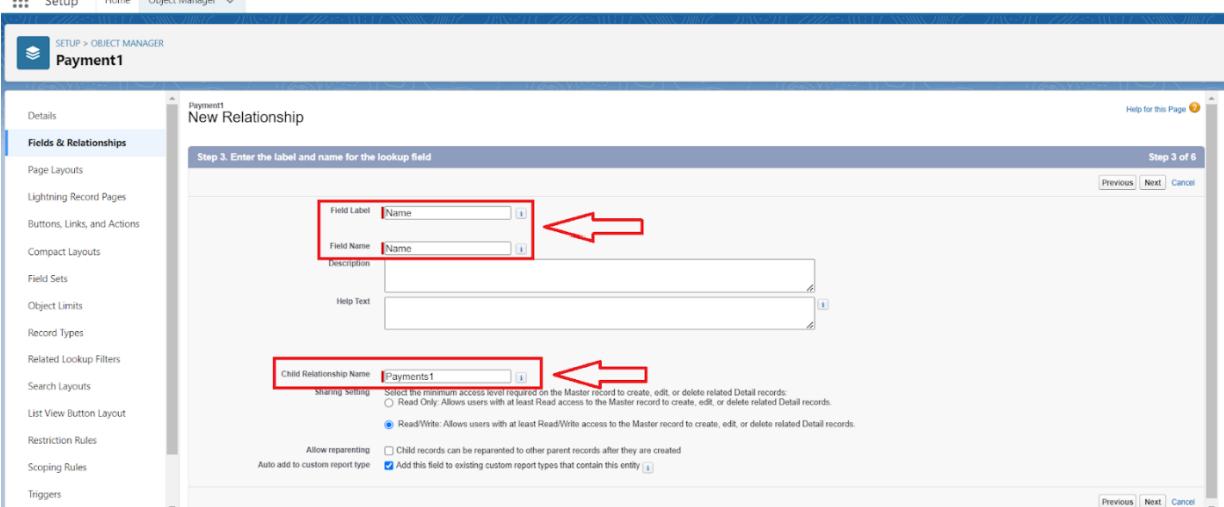
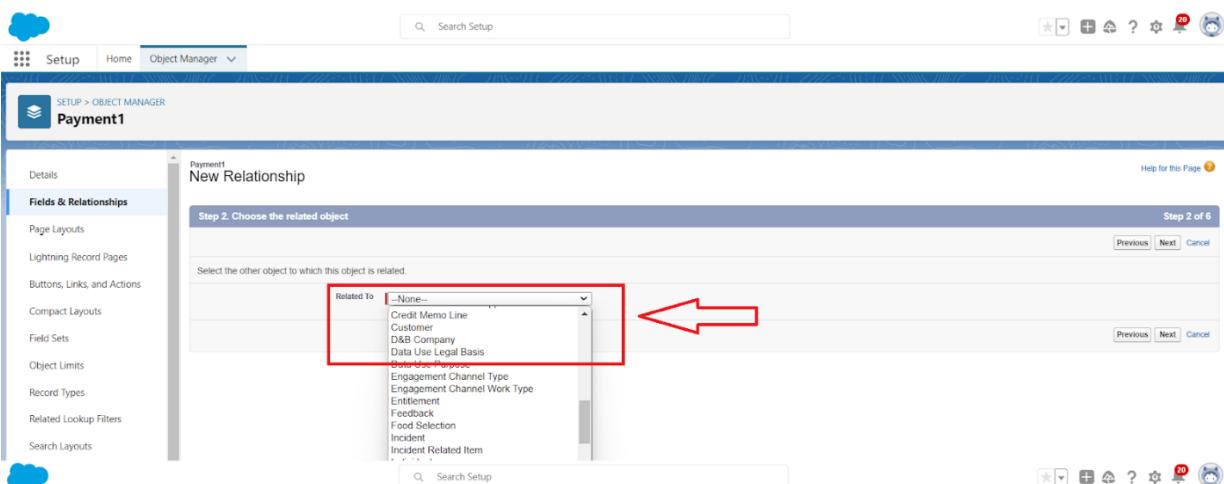
b.

Now click on “Fields& Relationships” > New

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



d. Click on Next



e.

Click on the Related to drop down and Selectthe Customer1 objectand click on Next

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

2. To createanother fields & relationship to an object:

- a. Go to setup > click on ObjectManager > 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', 'Object Manager', and a search bar. Below the navigation is a sidebar with various setup categories like Details, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'FIELDS & RELATIONSHIPS' for the 'Payment1' object. A red arrow points to the 'Payment1' object name in the title bar. Another red arrow points to the 'Fields & Relationships' link in the sidebar. A third red arrow points to the 'New' button at the top right of the list table. The table lists existing fields: Amount (Formula), Created By (Lookup), Last Modified By (Lookup), Name (Master-Detail), Payment ID (Number), Payment Mode (Picklist), Payment no (Auto Number), and Room Booking (Lookup). The columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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)	✓	

b.

Now click on “Fields& Relationships” > New

- c. Select Data Type as a “Lookup Relationship”
- d. 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 (2)

Single sharing
Double sharing
Triple sharing

Field Name: Room_Sharing (1)

Description:

Help Text:

Required: Always require a value in this field in order to save a record (3)

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

Default Value: Show Formula Editor

Use formula editor. Evaluate sum and dollar value API formats in double quotes - `{!sum(1)}`, round numbers to two decimal places - `{!1.23}`, show percentages as decimals - `{!10}`, and express date calculations in the standard format - `{!Today() + 7}`. To reference a field from a Custom Measure type record use: `{!CustomMeasure_Type__c!RecordName!FieldName!}`

- a. Fill the Above as following:
- Field Label: Room Sharing
 - Value - Select entervalues with each value separated by a new line
 - Single sharing
 - Double sharing
 - Triple sharing
 - Select required
- b. Click on Next > Next > Save and new.

2. To Create a Fields &Relationship to an Room BookingObject

To create fields &relationship to an object:

SETUP > OBJECT MANAGER
Object Manager (1)

153+ items. Sorted by Label

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 (2)	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	

1. Go to setup > click on Object Manager > type objectname(Room Booking) in the searchbar > click on the object.

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

Setup > Object Manager
Room Booking

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	✓	

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

Setup > Object Manager
Room Booking

Fields & Relationships

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

Data Type

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

Master-Detail Relationship

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

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

External Lookup Relationship

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

Checkbox

Currency

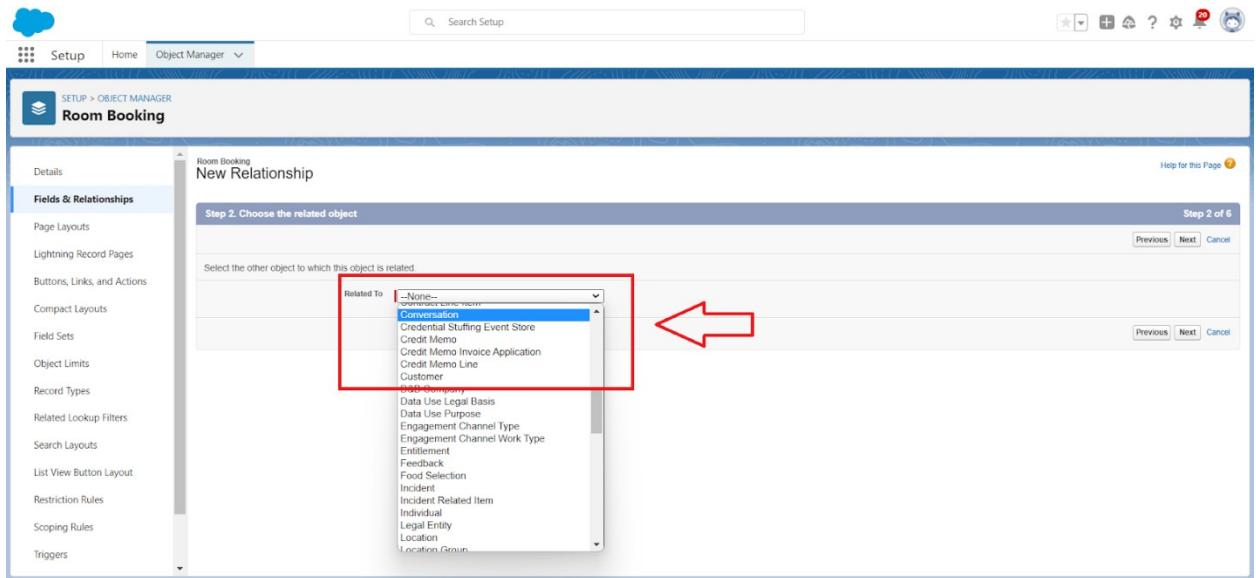
Date

Date/Time

Email

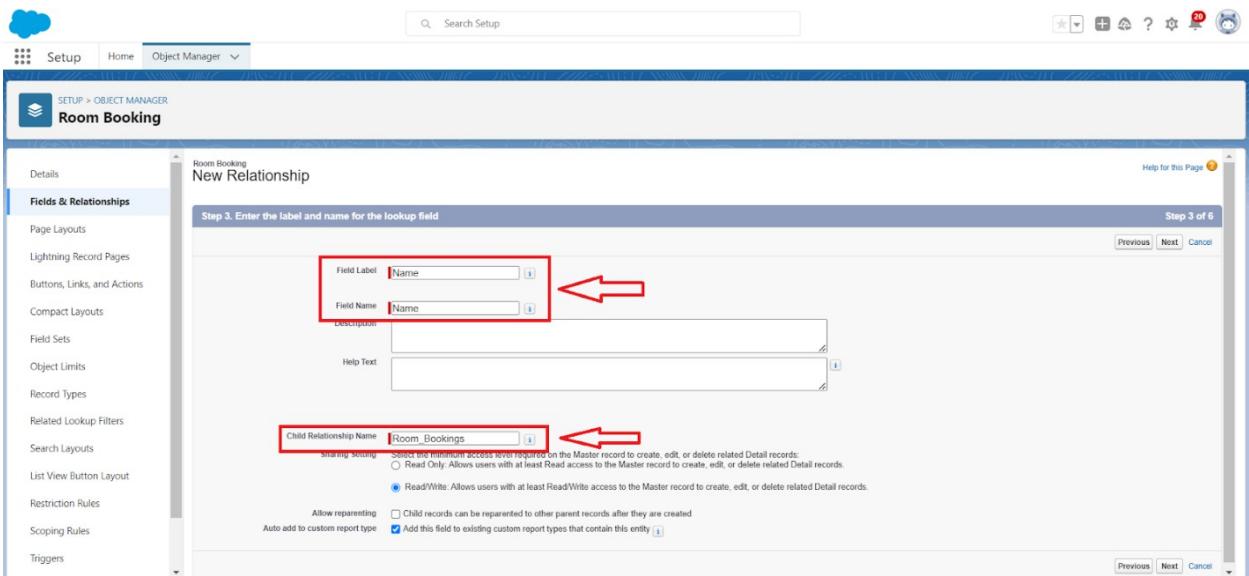
2. Click on Next

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



4. Fill the Above as following:

a. Change the FieldLabel: Name



b.

Field Name : It's gets auto generated

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

1. To create fields in an object:

- Go to setup > click on Object Manager> type objectname(Room Booking) in the searchbar > click on the object.

- b. Now click on “Fields & Relationships” > New
 - c. Select Data Type as a “Checkbox”
 - d. Click on Next
 - e. Fill the Above as following:
 - Field Label: AC-3000
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new
- 2. To create fields in an object:**
- a. Go to setup > click on Object Manager> type objectname(Room Booking) in the searchbar > click on the object.
 - b. Now click on “Fields & Relationships” > New
 - c. Select Data Type as a “Checkbox”
 - d. Click on Next
 - e. Fill the Above as following:
- Field Label: AdvancePayment for 1 Month
 - Field Name :It's gets auto generated
 - Click on Next > Next > Save and new
- 3. To create fields in an object:**
- a. Go to setup ? click on Object Manager? type object name(Room Booking)in the search bar ? click on the object.
 - b. Now click on “Fields & Relationships” ? New
 - c. Select Data Type as a “Currency”
 - d. Click on Next
 - e. 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
- 4. To Create a Fields & Relationship to an Object**
1. Go to setup > click on Object Manager> type objectname(Room Booking) in the searchbar > 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 Relatedto drop down and Selectthe “Total Rooms” object and click on

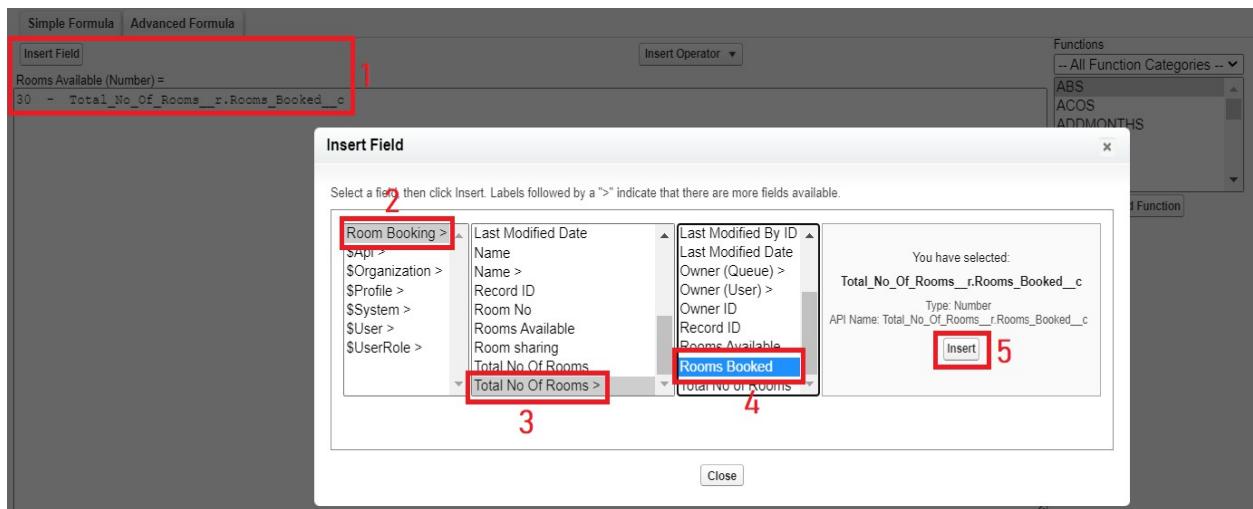
Next

- a. Fill the Above as following:
 - b. Change the FieldLabel: Total No Of Rooms
 - c. Field Name :It's gets auto generated
 - d. Click on Next > Next > Save and new.
5. **To Create a Rollup SummaryField in “TotalRoom Object”**
1. After Creatingthe Master- DetailRelationship Than Only you can create the Rollup Summary
 2. Goto 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-upSummary” and Click on Next
 - a. Fill the Above as following:
 - b. Field Label: Rooms Booked
 - c. Field Name :It's gets auto generated
 - d. Click on Next
 5. Select the Room Bookingsin the Summarized Object

The screenshot shows the 'Step 3. Define the summary calculation' page. At the top, it says 'Total Room New Custom Field'. Below that, it says 'Step 3 of 5'. There are 'Previous', 'Next', and 'Cancel' buttons. A red arrow points to the 'Summarized Object' dropdown, which is set to 'Room Bookings'. Another red arrow points to the 'Select Roll-up Type' section, where the 'COUNT' radio button is selected. The 'Master Object' is 'Total Room'. In the 'Select Roll-up Type' section, there are also options for SUM, MIN, and MAX. A 'Field to Aggregate' dropdown is set to 'None'. At the bottom, there is a 'Filter Criteria' section with two radio button options: 'All records should be included in the calculation' (selected) and 'Only records meeting certain criteria should be included in the calculation'.

6. Select the count Radio button in the select Roll-upType
 7. Click on Next > Next > Save and new
 8. **To create fieldsin an object:**
1. Go to setup > click on Object Manager> type objectname(Rooms Booking) in the searchbar > click on the object.

2. Now click on “Fields & Relationships” > New
3. Select Data type asa “Formula” and Click on Next
4. Fill the Above as following:
 - a. Field Label: Rooms Available
 - b. Field Name : It's gets auto generated
 - c. Select the FormulaReturn Type as “Number”
 - d. Select the Decimalplaces as “0” and Clickon Next
 - e. 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 selectthe Total No Of Roomsin the second Column and select the Room Booked in the third column and click on insert “



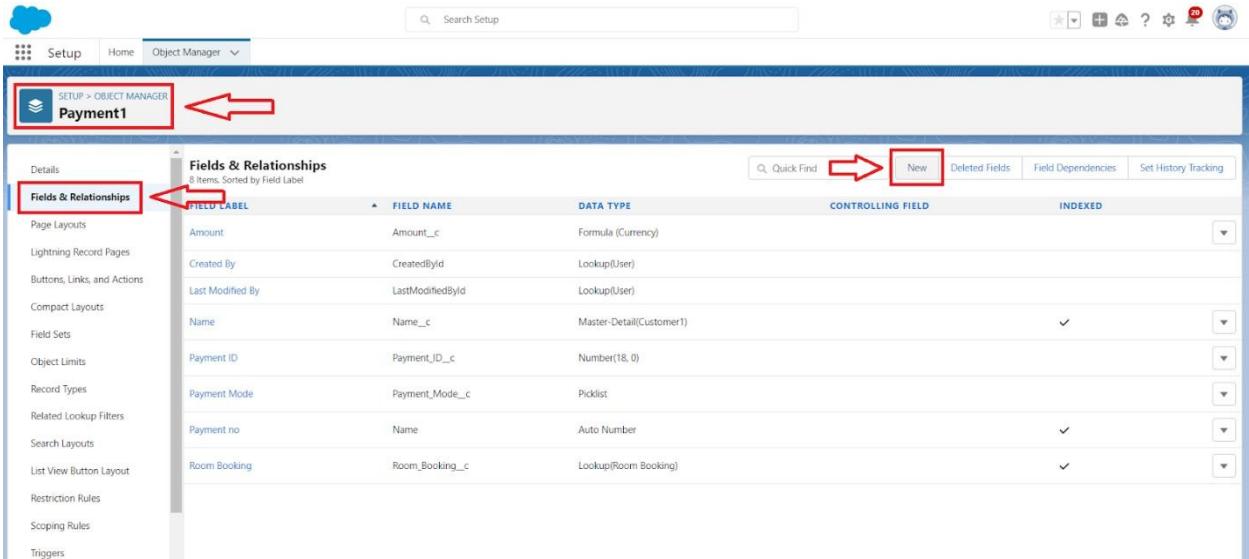
30 - Total_No_of_Rooms__r.Rooms_Booked__c ” and Check Syntax

- f. Click on Next > Next > Save and new.
1. To create fieldsin an object:
 1. Go to setup > click on Object Manager> type objectname(Room Booking) in the searchbar > 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:
 - a. Field Label: Check in
 - b. Field Name :It's gets auto generated
 - c. Click on Next > Next > Save and new
2. To create fields in an object:
 1. Go to setup > click on Object Manager> type objectname(Room Booking) in the searchbar > 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:
 - a. Field Label: Check Out
 - b. Field Name :It's gets auto generated
 - c. Click on Next > Next > Save and new

Creation of Fields& Relationship for Payment1 Object

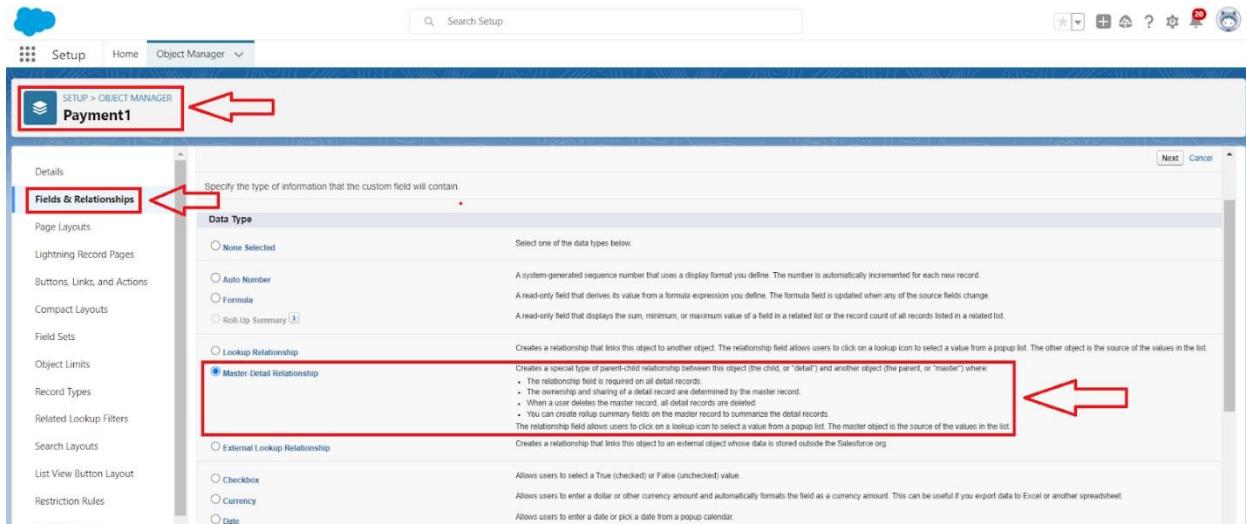
1. To create fields & relationship to an object:
 - a. Go to setup > click on ObjectManager > type object name(Payment1) in the search bar > click on the object.



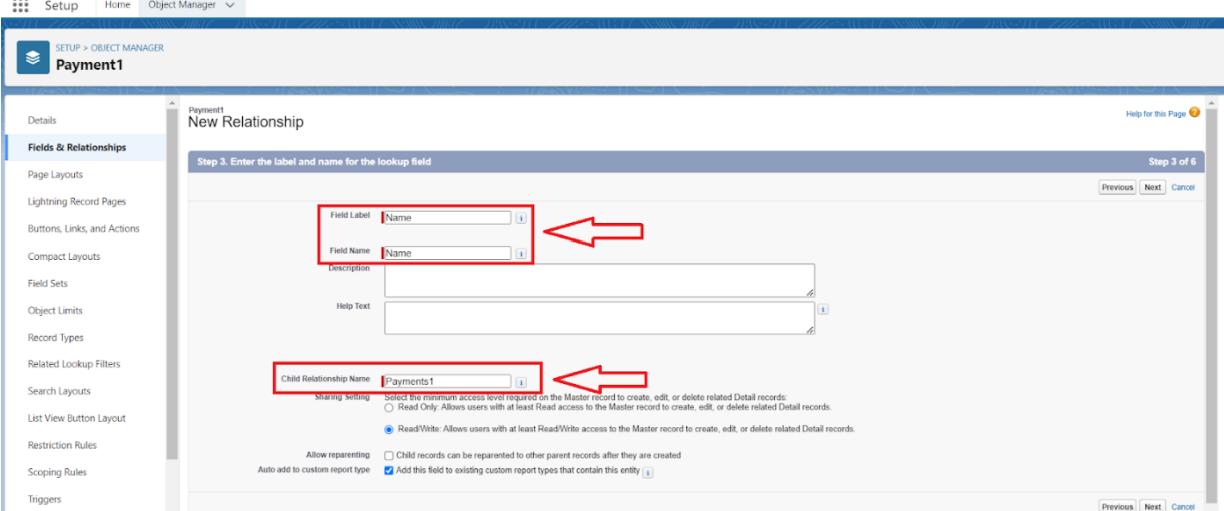
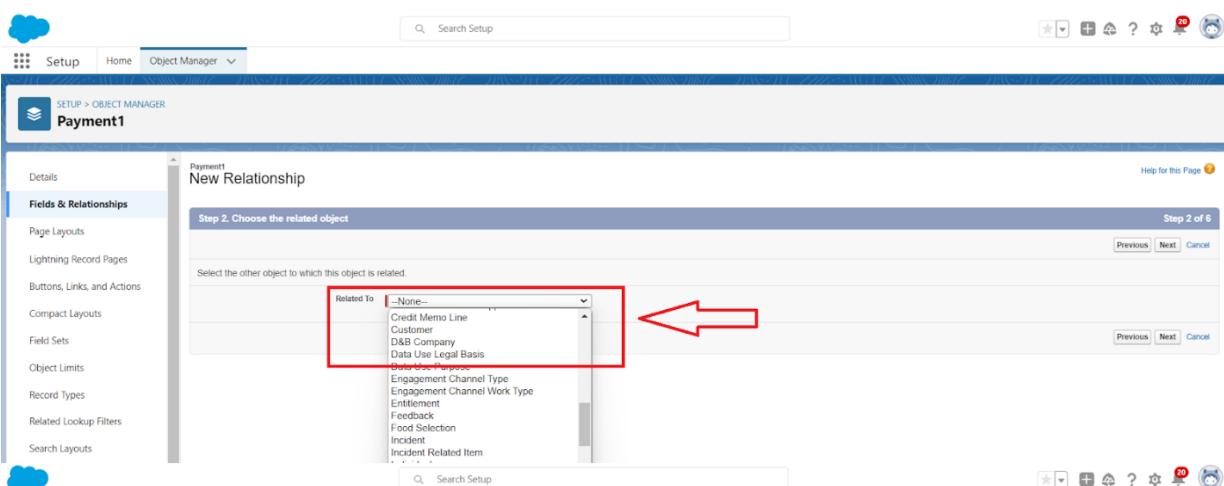
The screenshot shows the Salesforce Object Manager interface for the 'Payment1' object. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Fields & Relationships' link in the left sidebar under the 'Details' section. A third red box highlights the 'New' button in the top right corner of the main grid area. The main grid displays various fields with their labels, names, data types, and other properties. A red arrow points from the 'Fields & Relationships' link in the sidebar to the 'Fields & Relationships' link in the grid header.

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)	✓	

- b.
- Now click on “Fields& Relationships” > New
- c. Select Data Type as a “Master-detail Relationship”



d. Click on Next



e.

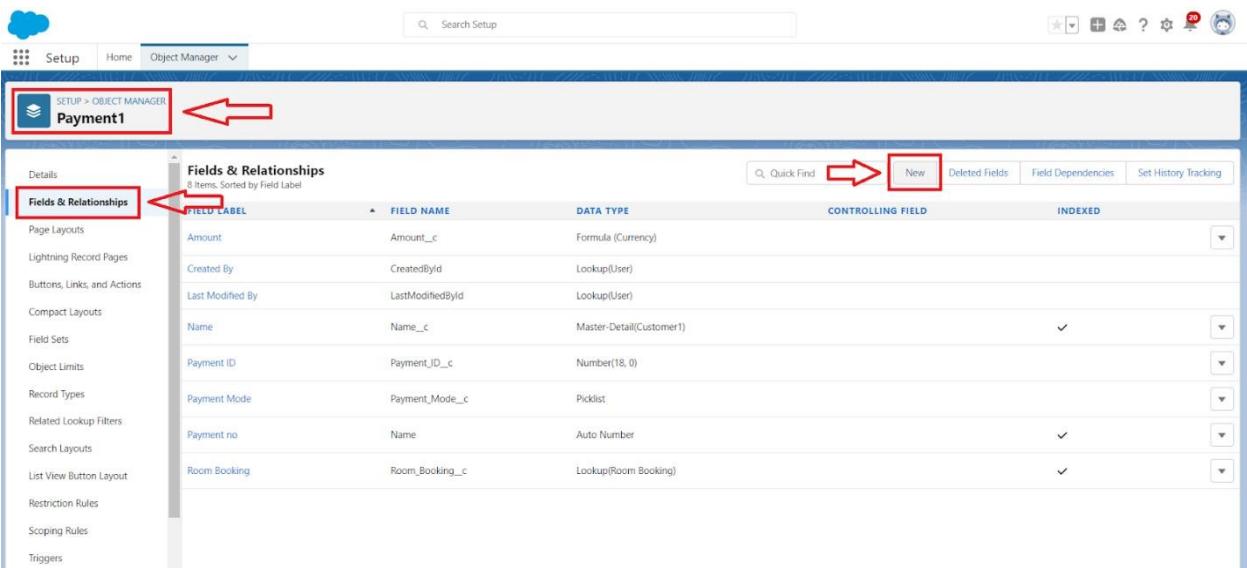
Click on the Related to drop down and Selectthe Customer1 objectand click on Next

- f. Fill the Above as following:
 - i. Change the Field Label: Name

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

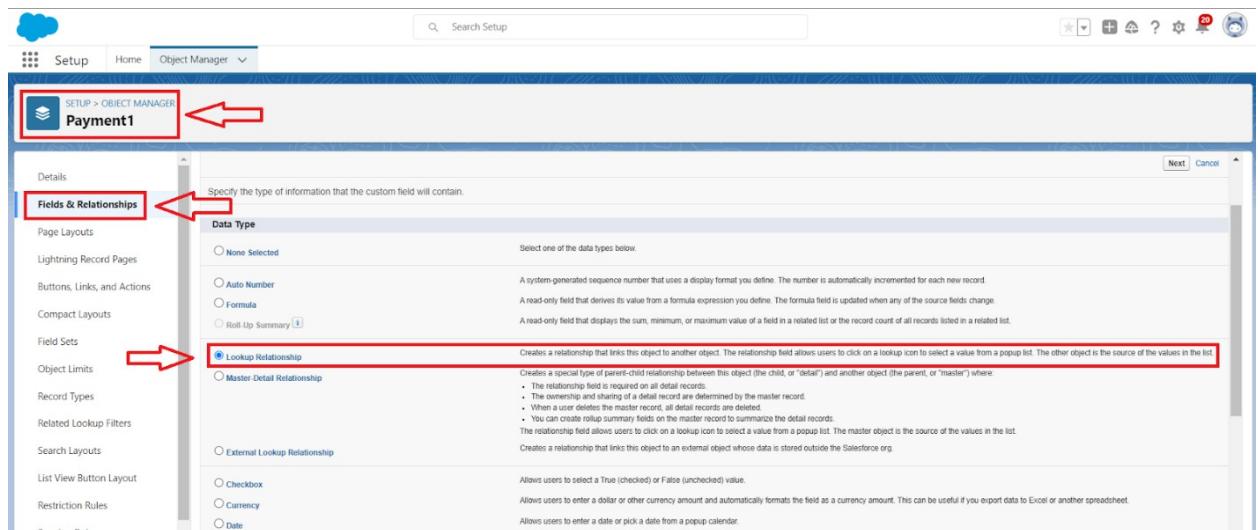
2. To createanother fields & relationship to an object:

- a. Go to setup > click on ObjectManager > type object name(Payment1) in the search bar > click on the object.



The screenshot shows the Salesforce Object Manager interface for the 'Payment1' object. The left sidebar lists various setup options like Details, Page Layouts, Lightning Record Pages, etc. The main area is titled 'Fields & Relationships' and shows a table of existing fields. A red arrow points to the 'Payment1' object in the header bar. Another red arrow points to the 'Fields & Relationships' link in the sidebar.

- b. Now click on “Fields& Relationships” > New
- c. Select Data Type as a “Lookup Relationship”
- d. Click on Next



The screenshot shows the 'New Custom Field' wizard for the 'Payment1' object. The left sidebar shows setup options. The main area has a heading 'Specify the type of information the custom field will contain.' and a 'Data Type' section. Under 'Data Type', 'Lookup Relationship' is selected, indicated by a red box and an arrow. Other options like 'None Selected', 'Auto Number', 'Formula', 'Roll Up Summary', 'Master Detail Relationship', 'External Lookup Relationship', 'Checkbox', 'Currency', and 'Date' are also listed. A detailed description of 'Lookup Relationship' is shown in a red box at the bottom of the section.

- e. Click on the Relatedto drop down and Selectthe Room Bookingobject and click on Next

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

Screenshot 1: Step 2. Choose the related object

In this step, the user is selecting the object to which the current object is related. The "Related To" dropdown menu is open, showing a list of objects. The "Room Booking" option is highlighted with a red box and a red arrow pointing to it. Other options in the list include Room Order Line Item, Room Booking, Seller, Service Appointment, Service Contract, Service Resource, Service Territory, Service Territory Work Type, Session Hijacking Event Store, Shift, Social Persona, Solution, Store, Threat Detection Feedback, and Time Slot.

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

In this step, the user is defining the lookup field settings. The "Field Label" is set to "Room Booking" and the "Field Name" is set to "Room_Booking". Both of these fields are highlighted with red boxes and red arrows pointing to them. Below these, the "Child Relationship Name" is set to "Payments1". There are also other configuration options like "Required" (unchecked), "Always require a value in this field in order to save a record" (unchecked), and "What to do if the lookup record is deleted" (radio button selected for "Clear the value of this field"). At the bottom, there are sections for "Lookup Filter" and "Auto add to custom report type".

- f. 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 fieldsfor the Payment1object

To createfields in an object:

- Go to setup > click on ObjectManager > type object name(Payment1) in the search bar > click on the object.
- Now click on “Fields & Relationships” > New

SETUP > OBJECT MANAGER
Payment1

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

Fields & Relationships

FIELD LABEL

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

SETUP > OBJECT MANAGER
Payment1

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

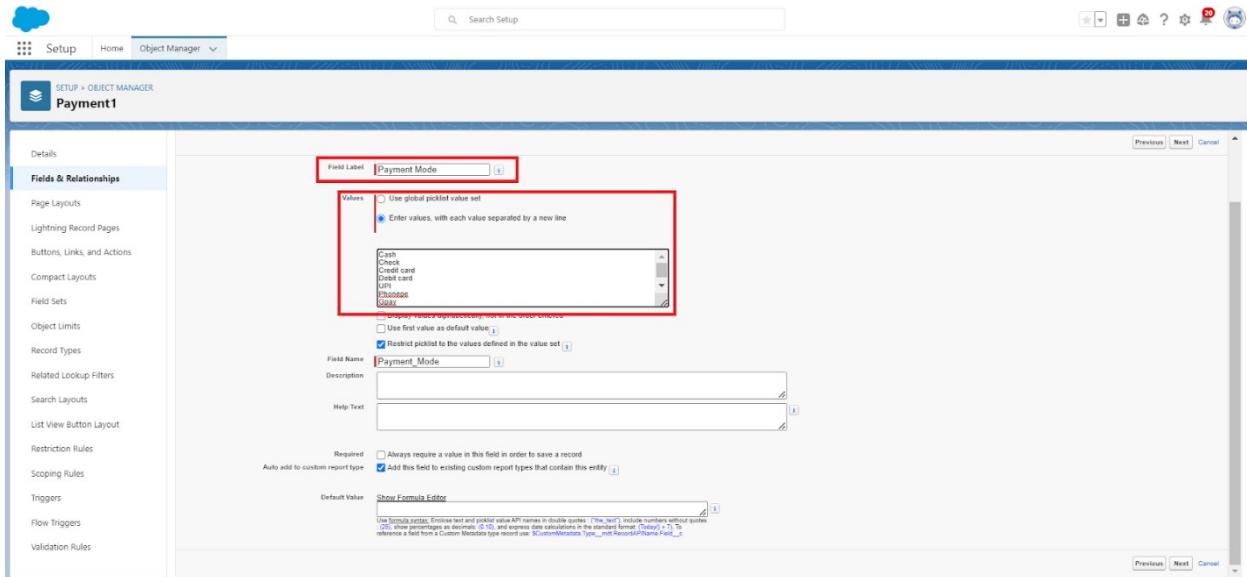
Fields & Relationships

Extension Catalog: Picklist

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

1.

Select Data Type as a “Picklist”



2. Fill the Above as following:

- a. Field Label: PaymentMode
 - b. Value - Selectenter 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
 - a. Select required
 - b. Click on Next > Next > Save and new.

Cross ObjectFormula 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 ObjectFormula 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.

1. Create a Cross objectformula Field in Payment1 Object

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

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

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

3. Select Data Type as a “Formula”

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

Data Type

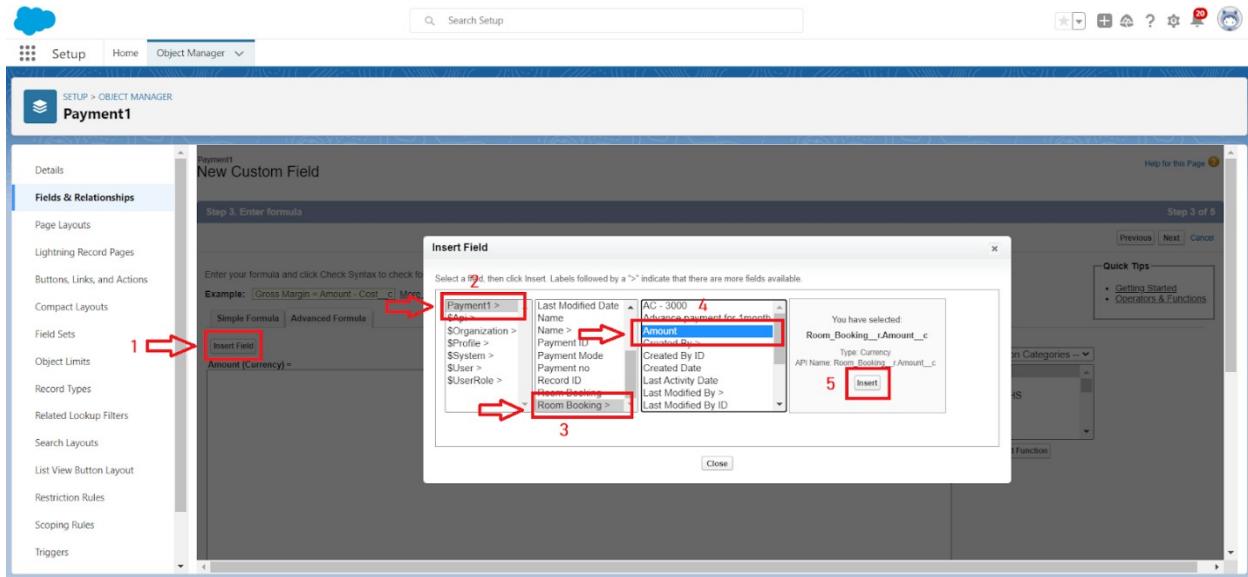
- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship

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.

4.

Click on Next

5. Enter the Field label:Amount and Field name: gets auto generated and click on Next
6. In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “Room_Booking__r.Amount_c”.



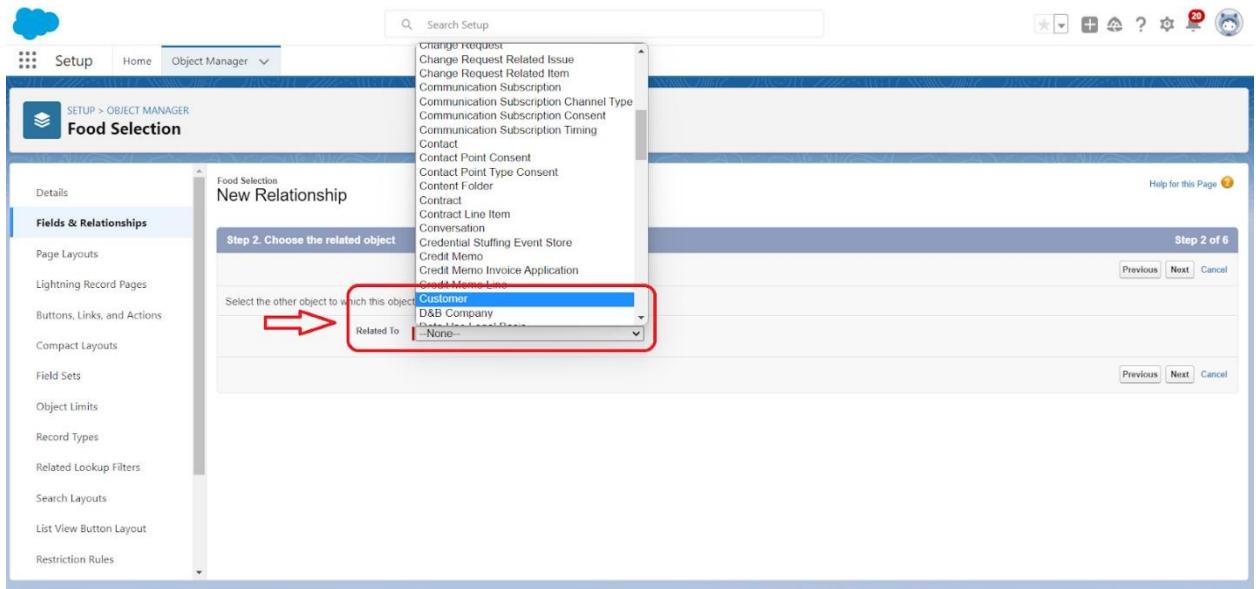
7. Click on the Check syntax: No syntax errors in merge fields
8. Click on Next > Next > Save and new.

Creation of fields for the Food Selection object

1. To create fields & relationship to an object:
 - a. Go to setup > click on ObjectManager > type object name(RoomBooking) in the search bar > click on the object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Breakfast	Breakfast__c	Picklist		
Created By	CreatedBy	Lookup(User)		
Dinner	Dinner__c	Picklist		
Food Selection No	Name	Auto Number		✓
Last Modified By	LastModifiedBy	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	

- b.
- Now click on “Fields & Relationships” > New
- c. Select Data Type as a “Master-detail Relationship”
- d. Click on Next
- e. Click on the Relatedto drop down and Select the Customer1 object and click on Next



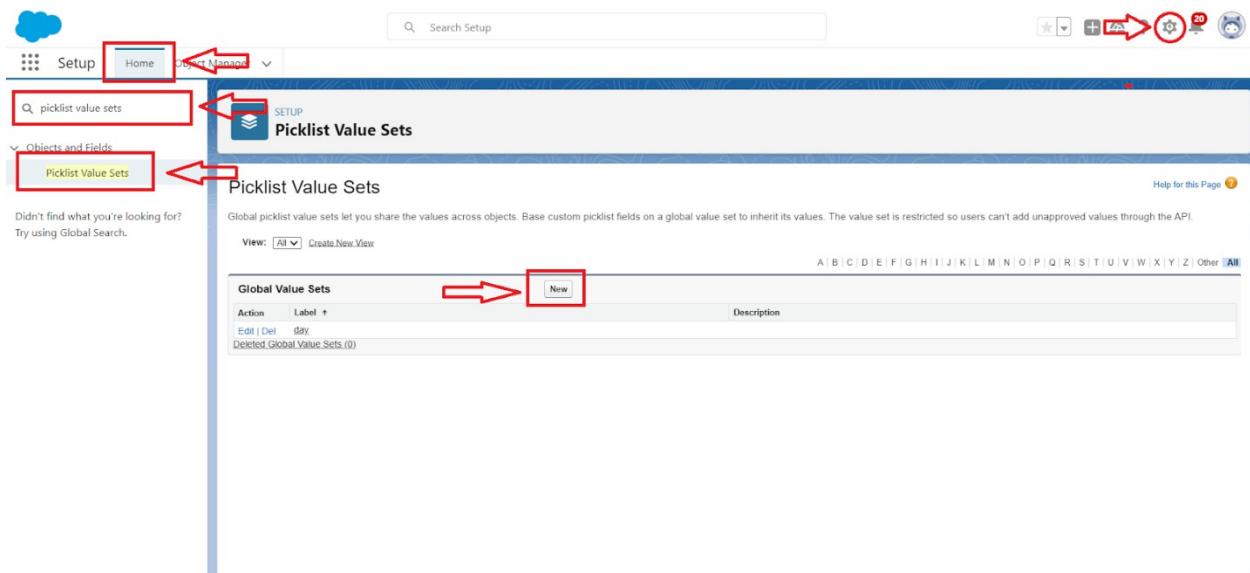
- f. Fill the Above as following:
 - i. Change the Field Label: Name
 - ii. Field Name :It's gets auto generated
 - iii. Click on Next > Next > Save and new.

Picklist value sets:

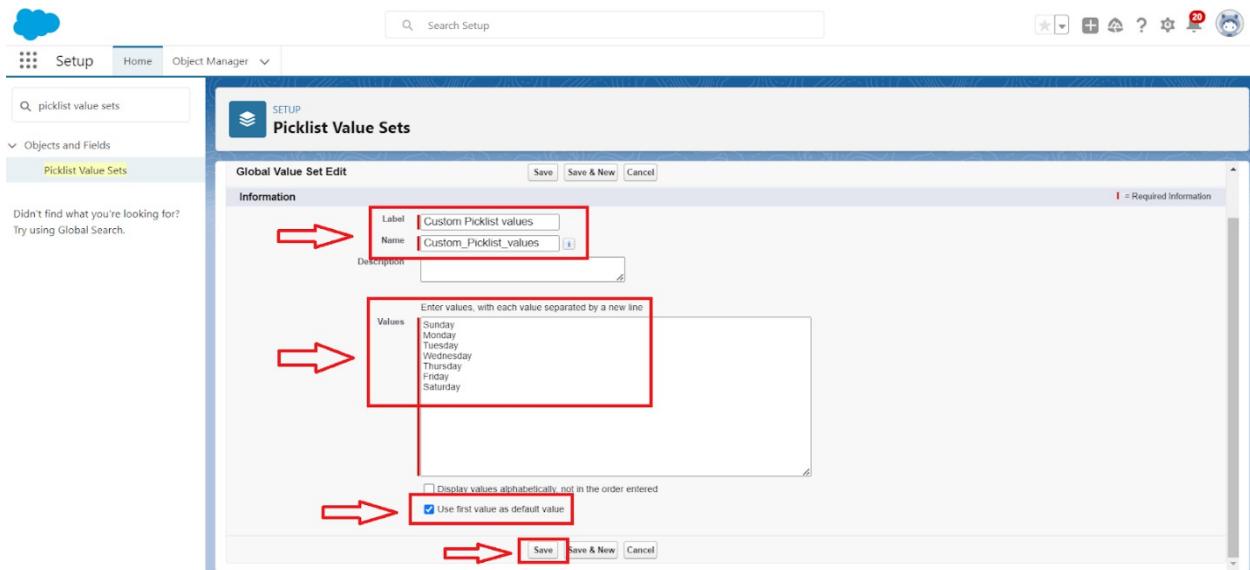
Global picklistvalue sets let you share the values across objects. Base custom picklistfields on a global value set to inherit its values. The value set is restricted so users can't add unapproved values through the API.

Create a picklist valueset:

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 valueset and clickon new
4. Enter the Label name and API name automatically Generate
5. Enter the values with each value separated by a new line
 - a. Sunday
 - b. Monday
 - c. Tuesday
 - d. Wednesday
 - e. Thursday
 - f. Friday
 - g. Saturday



1. Check the Use firstvalue as defaultvalue and Clickon save.

1. Create a picklist Fieldfor Food selection object

To createfields in an object:

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

Object Manager		
103+ items. Sorted by Label		
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
3. Select Data Type as a “Picklist”

4. Fill the Above as following:

- a. Field Label: Breakfast
- b. Under Value - Select the Use globalpicklist value set
- c. Under the drop down select the Custom PicklistValues
- d. Select required
- e. Click on Next > Next > Save and new.

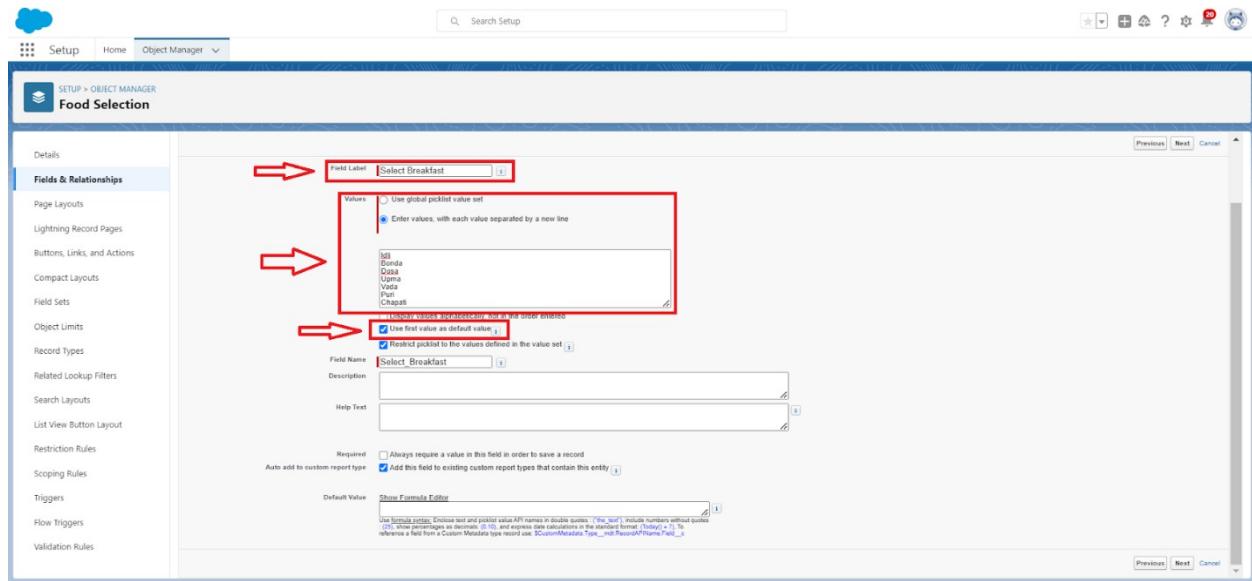
2. Create another picklistField for Food selection object

To create fields in an object :

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

- Now click on “Fields & Relationships” > New



- Select Data Type as a “Picklist”
- Fill the Above as following:
 - Field Label: Select Breakfast
 - Under Value - Enter values,with each value separated by a new line
- Idli
- Bonda
- Dosa
- Upma
- Vada
- Puri
- Chapati
 - Select Checkbox Use First valueas 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 ObjectManager > type object name(FoodSelection) 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. Another red box highlights the 'Food Selection' row in the list, which is also selected. A red arrow points to the 'Food Selection' row. A second red arrow points to the dropdown menu next to the last entry in the list.

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

The screenshot shows the 'Fields & Relationships' page for the 'Food Selection' object. A red box highlights the 'Food Selection' object in the top left. A red box highlights the 'Fields & Relationships' tab in the left sidebar. A red box highlights the 'Field Dependencies' button in the top right. A red arrow points to the 'Fields & Relationships' tab. A second red arrow points to the 'Field Dependencies' button.

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	Veena Venkata Varaprasad Androthu, 07/06/2023, 3:45 pm
Edit Del	Dinner	Select dinner	Veena Venkata Varaprasad Androthu, 07/06/2023, 3:55 pm
Edit Del	Lunch	Select Lunch	Veena Venkata Varaprasad Androthu, 07/06/2023, 3:56 pm

4. Under Controlling Field: Breakfast, Dependent Field: Select Breakfastand 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	Dependent Field
None	Custom Fields
None	Breakfast
None	Dinner
None	Lunch
None	Select Breakfast
None	Select dinner
None	Select Lunch

Fields & Relationships

Instructions

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent.
- Use the Preview button to test the results.

Legend
Excluded Value
Included Value

Breakfast:	Sunday	Monday	Tuesday	Wednesday	Thursday
Select Breakfast:	Idli	Idli	Idli	Idli	Idli
	Bonda	Bonda	Bonda	Bonda	Bonda
	Dosa	Dosa	Dosa	Dosa	Dosa
	Upma	Upma	Upma	Upma	Upma
	Vada	Vada	Vada	Vada	Vada
	puri	puri	puri	puri	puri
	Chapati	Chapati	Chapati	Chapati	Chapati

5. Under the Sunday Ctrl and selectthe Picklist valuesIdli,Dosa,Puri and Click

on IncludeValues in such a way that do for the remaining days and click on save.

3. To createfields in an object:

- a. Go to setup > click on ObjectManager > type object name(FoodSelection) in the search bar ? click on the object.
- b. Now click on “Fields & Relationships” > New
- c. Select Data Type as a “Picklist”
- d. Fill the Above as following:
 - i. Field Label: Lunch
 - ii. Under Value - Select the Use globalpicklist value set
 - iii. Under the drop down selectthe Custom PicklistValues
 - iv. Select required
 - v. Click on Next > Next > Save and new.

4. To createfields in an object:

1. Go to setup > click on ObjectManager > type object name(FoodSelection) 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:
 - a. Field Label: Select Lunch
 - b. 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
- a. Select Checkbox Use First valueas default Value
- b. 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:**
- a. Go to setup > click on ObjectManager > type object name(FoodSelection) in the search bar > click on the object.
 - b. Now click on “Fields & Relationships” > New
 - c. Select Data Type as a “Picklist”
 - d. Fill the Above as following:
 - i. Field Label: Dinner
 - ii. Under Value - Select the Use globalpicklist value set
 - iii. Under the drop down select the Custom PicklistValues
 - iv. Select required
 - v. Click on Next > Next > Save and new.
7. **To create fields in an object:**
- a. Go to setup > click on ObjectManager > type object name(FoodSelection) in the search bar > click on the object.
 - b. Now click on “Fields & Relationships” > New
 - c. Select Data Type as a “Picklist”
 - d. Fill the Above as following:
 - i. Field Label: SelectDinner
 - ii. 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
 - a. Select Checkbox Use First valueas default Value
 - b. Click on Next > Next > Save and new.
 - c.

To create Field dependencies for Dinner and Select Dinner.

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

Creation of fields for the Feedbackobject

1. create fields& relationship to an object:

- a. Go to setup > click on ObjectManager > type object name(Feedback) in search bar > click on the object.

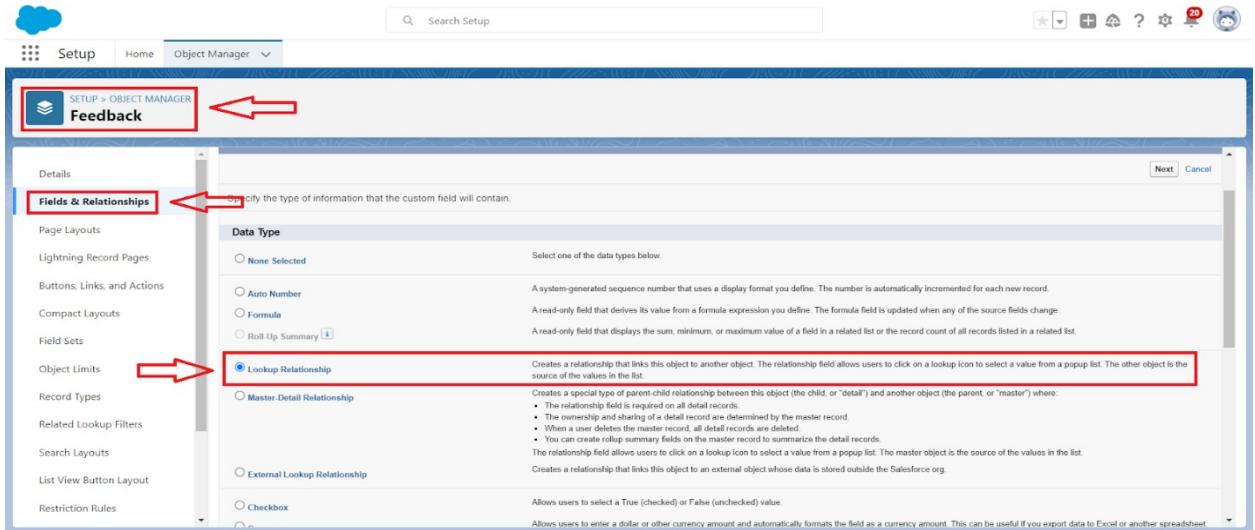
Fields & Relationships					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Feedback NO	Name	Auto Number			
Food	Food_c	Picklist			
Houscleaning	Houscleaning_c	Picklist			
Internet	Internet_c	Picklist			
Last Modified By	LastModifiedById	Lookup(User)			
Name	Name_c	Lookup(Customer1)			
Owner	OwnerId	Lookup(User/Group)			
Suggestion	Suggestion_c	Text Area(255)			

b.

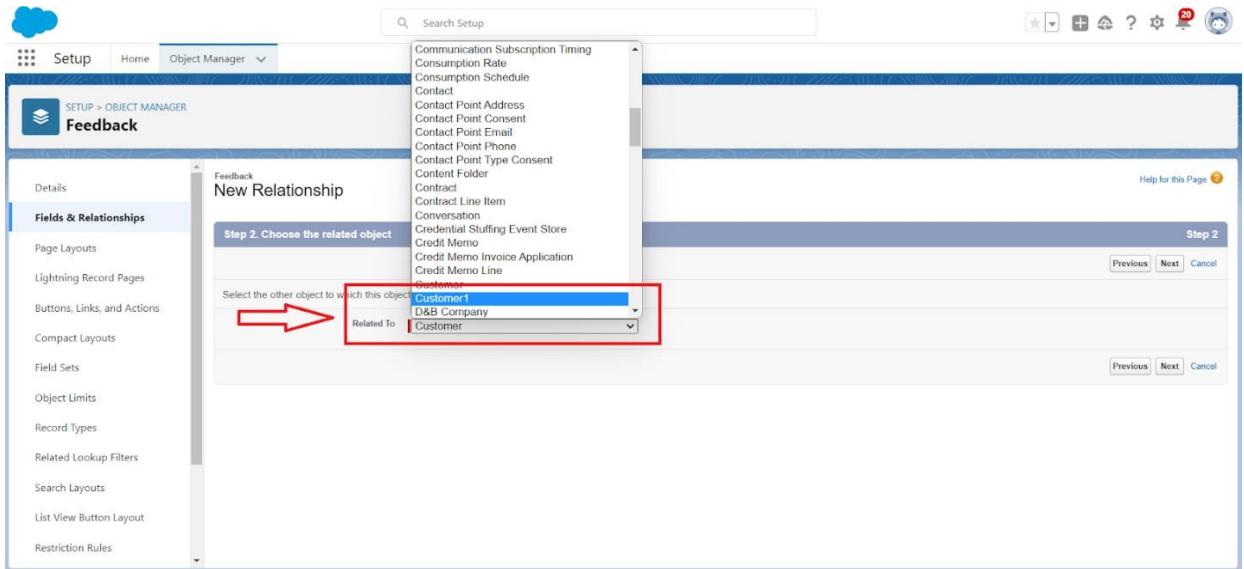
Now click on “Fields& Relationships” > New

- c. Select Data Type as a “Lookup Relationship”

d. Click on Next



e. Click on the Relatedto drop down and Selectthe Customer1 objectand click on Next



f. Fill the Above as following:

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

The screenshot shows the 'Object Manager' setup page for the 'Feedback' object. The 'Fields & Relationships' tab is selected. A red arrow points to the 'Field Label' input field, which contains 'Name'. Another red arrow points to the 'Child Relationship Name' input field, which also contains 'Name'. The 'Field Name' input field is empty.

2. To createAnother fields in an Same object:

- Go to setup > click on ObjectManager > type object name(Feedback) in search bar > click on the object.

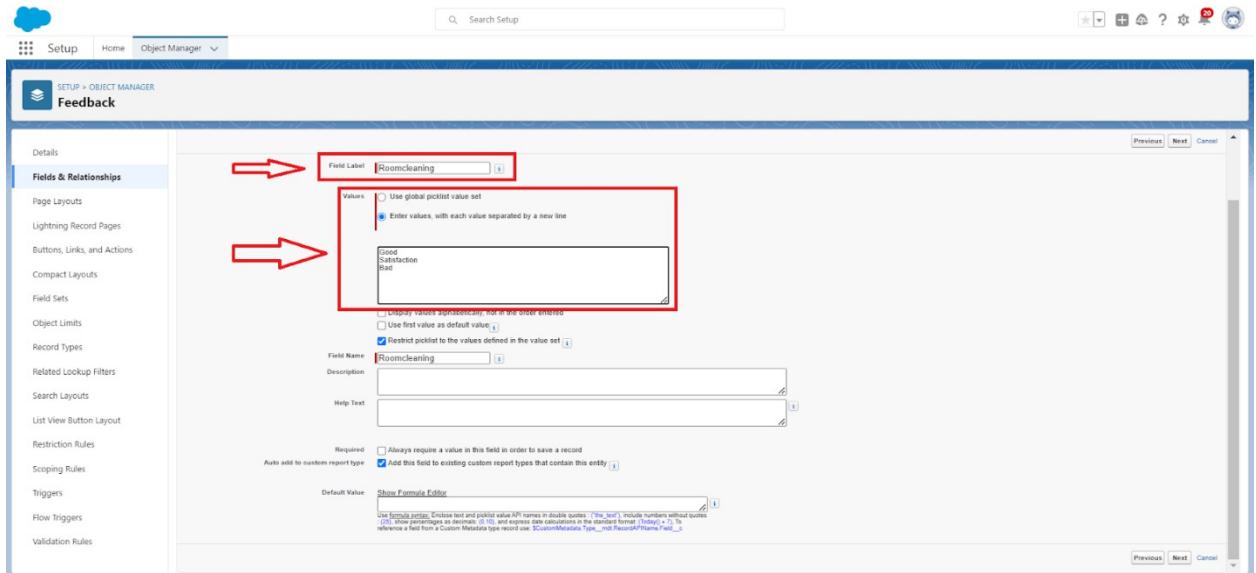
The screenshot shows the 'Fields & Relationships' list for the 'Feedback' object. A red box highlights the 'Feedback' object name in the breadcrumb. A red arrow points to the 'Fields & Relationships' tab. A red box highlights the 'New' button in the top right corner of the list table. The table lists various fields with their labels, names, data types, controlling fields, and indexing status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Feedback N0	Name	Auto Number		✓
Food	Food_c	Picklist		▼
Housecleaning	Housecleaning_c	Picklist		▼
Internet	Internet_c	Picklist		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Name	Name_c	Lookup(Customer)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Suggestion	Suggestion_c	Text Area(25)		▼

b.

Now click on “Fields& Relationships” > New

- Select Data Type as a “Picklist”
- Click on Next



- e. 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
 - a. Click on Next > Next > Save and new.
3. To create a AnotherFields in an Same Object
1. Go to setup > click on ObjectManager > 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:
 - a. Field Label: Internet
 - b. Field Name :It's gets auto generated
 - c. Under Values select Enter values, with each value separated by a new line
 1. Good
 2. Satisfaction
 3. Bad
 - a. Click on Next > Next > Save and new.

4. To create a AnotherFields in an Same Object

1. Go to setup > click on ObjectManager > 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:
 - a. Field Label: Food
 - b. Field Name :It's gets auto generated
 - c. Under Values selectEnter values, with each value separated by a new line

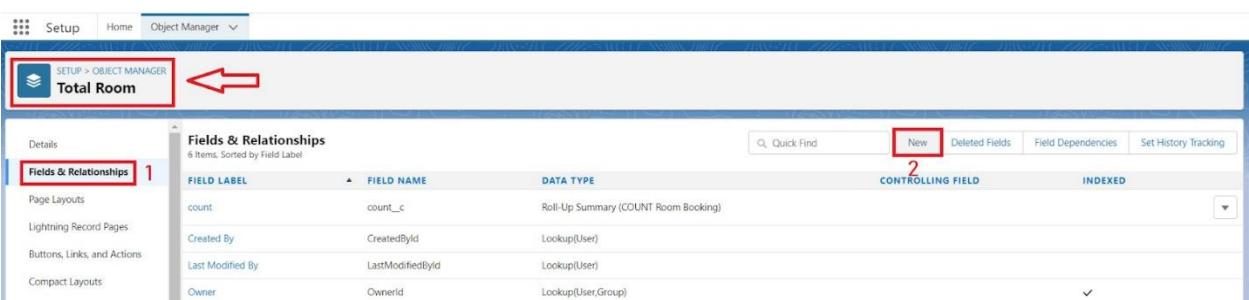
 1. Good
 2. Satisfaction
 3. Bad
 - a. Click on Next > Next > Save and new.

5. To create a AnotherFields in an Same Object

1. Go to setup > click on ObjectManager > 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:
 - a. Field Label: Suggestion
 - b. Field Name :It's gets auto generated
 - c. Click on Next > Next > Save and new.

Creation of fields for the Total Rooms object

1. To createfields in an object:
 - a. Go to setup> click on Object Manager> type objectname(Total Rooms) in search bar > click on the object.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it, the object name 'Total Room' is selected. On the left, a sidebar lists 'Details', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', and 'Compact Layouts'. The main area is titled 'Fields & Relationships' and shows a table of existing fields. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The first field listed is 'count' with 'count_c' as the field name and 'Roll-Up Summary (COUNT Room Booking)' as the data type. Other fields include 'Created By', 'Last Modified By', and 'Owner'. At the bottom right of the table, there are buttons for 'Quick Find', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking', with a 'New' button highlighted by a red box and arrow.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
count	count_c	Roll-Up Summary (COUNT Room Booking)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		

b.

Now click on “Fields& Relationships” > New

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

SETUP > OBJECT MANAGER
Total Room

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Total Room
New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected

Auto Number

Formula 3

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.

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

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

The relationship field is required on all detail records.

d. Fill the Above as following:

e. Field Label:Rooms Available

f. Field Name : It's gets auto generated

g. Select the FormulaReturn Type as “Number”

h. Select the Decimalplaces as “0” and Click on Next

SETUP > OBJECT MANAGER
Total Room

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

Total Room
New Custom Field

Step 1. Choose the field type

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

Data Type

None Selected

Auto Number

Formula 3

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.

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

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

The relationship field is required on all detail records.

Field Label Rooms Available

Field Name Rooms_Available 4

Add this field to existing custom report types that contain this entity

Formula Return Type

None Selected

Checkbox

Currency

Date

DateTime

Number 5

Percent

Text

Time

Options Decimal Places 0 Example: 999 6

Select one of the data types below.

Calculate a boolean value.
Example: `TOORIGIN > CloseDate`

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `(Oran 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: `Next = TIMEVALUE(NOW()) + 1`

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

- Click on the Advanced Formula“ 30 - Rooms_Booked__c ” and Check Syntax
- Click on Next > Next > Save and new.

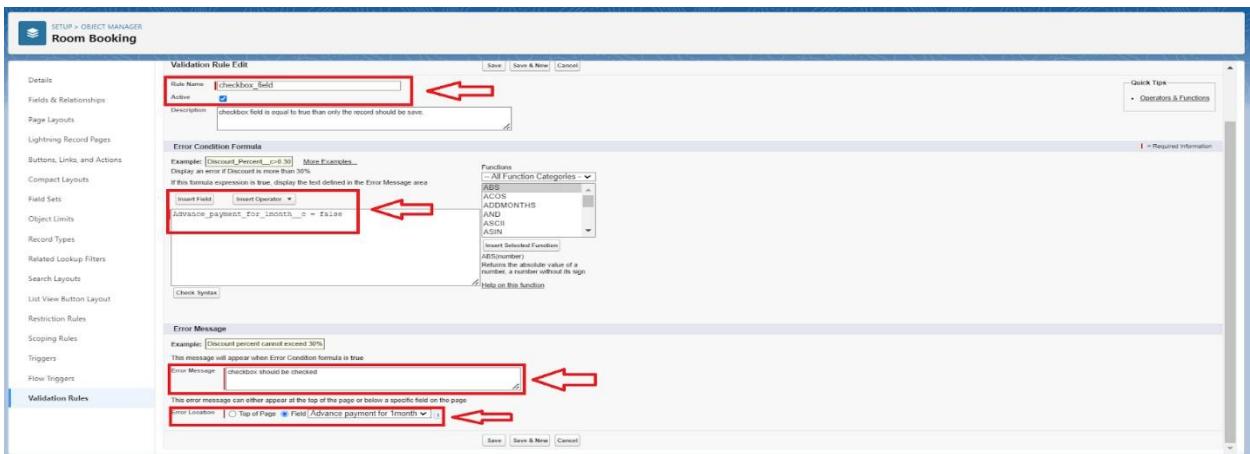
Validation rule

Validation rules are applied when a user tries to save a record and are used to

check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

create a validation rule to an Room BookingObject

1. Go to setup > click on Object Manager > type objectname(Room Booking) in the searchbar > click on the object.
2. Now click on “Validation rule” at top > New.
3. Enter Rule name “checkbox field” and make the validation should be Active.
4. Enter the formula in the formulaBox “Advance_payment_for_1month_c = false” and check for syntax error.
5. Enter the error message “Checkbox should be checked”



6. Select error location as field(Advance payment for 1month)
7. Click on save.

create a Another validation rule to an Room BookingObject

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

The screenshot shows the 'Rule Definition' page in Salesforce. A validation rule named 'check_in_rule' is being configured.

- Step 1:** The 'Rule Name' field is set to 'check_in_rule' and has a red box around it. The 'Active' checkbox is checked.
- Step 2:** The 'Error Condition Formula' section contains the formula: 'Check_in_c = False'. A red box highlights the formula entry area, and the number '2' is placed to its right.
- Step 3:** The 'Error Message' section displays the message: 'Check box should be checked'. A red box highlights the message entry area, and the number '3' is placed to its right.
- Step 4:** The 'Error Location' section shows the 'Field' radio button selected, and the 'Check in' field is chosen. A red box highlights this selection, and the number '4' is placed to its right.

6. Select error location as field(Check in)
7. Click on save.

Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, RecordTypes, 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.

- a. Contract Manager
- b. Read Only
- c. Marketing User
- d. Solutions Manager
- e. Standard User
- f. 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.

Customuser 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 'Clone Profile' dialog box. At the top, it says 'SETUP Profiles'. Below that is a section titled 'Clone Profile' with the instruction 'Enter the name of the new profile.' A note says 'You must select an existing profile to clone from.' There is a 'User License' dropdown set to 'Salesforce'. The 'Profile Name' field contains 'Custom user', with a red arrow pointing to it. At the bottom right are 'Save' and 'Cancel' buttons, with another red arrow pointing to the 'Save' button.

2. Enter profilename (Custom User) > Save.
3. While still on the profile page, then click Edit.
4. Scroll down to CustomObject Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

The screenshot shows the 'Edit Profile' page for 'Custom user'. It has sections for 'Session Settings' (Session Times Out After: 8 hours of inactivity, Session Security Level Required at Login: None) and '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). Two red arrows point to the 'Basic Access' sections for 'Customers' and 'Payments', both of which have 'Give All' checked under all four categories (Read, Create, Edit, Delete).

5. Scroll down and Click on Save.

Customplatform 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 profilepage, then click Edit.
4. Scroll down to CustomObject Permissions and Give only Read access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

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

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

Session Settings
Session Times Out After: 2 hours of inactivity [i](#)
Session Security Level Required at Login: [None](#) [i](#)

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.

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 profilepage, 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 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"/>	<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.

Roles

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

Marketing Role

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

Your Organization's Role Hierarchy

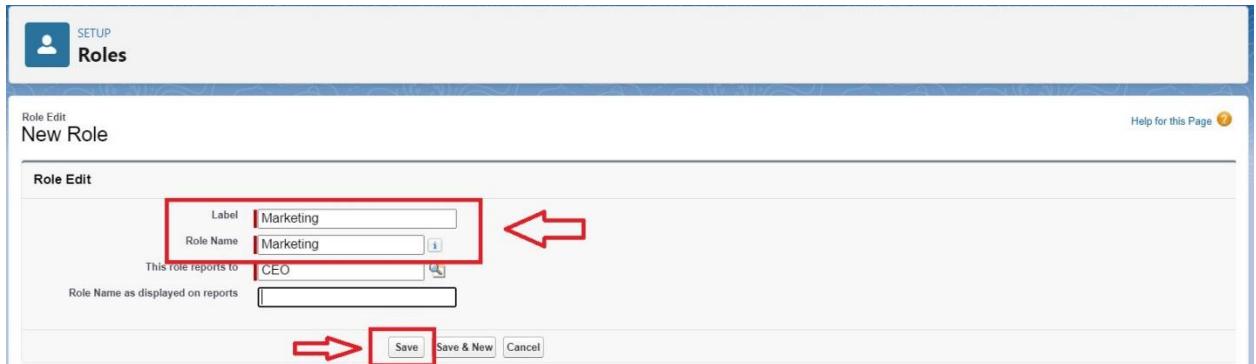
Collapse All | Expand All

- Nick Enterprises
 - Add Role
 - CEO | Edit | Del | Assign
 - Add Role
 - HR | Edit | Del | Assign
 - Add Role
 - Manager | Edit | Del | Assign
 - Add Role
 - On Site Emp | Edit | Del | Assign
 - Add Role
 - Remote Emp | Edit | Del | Assign
 - Add Role

2.

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

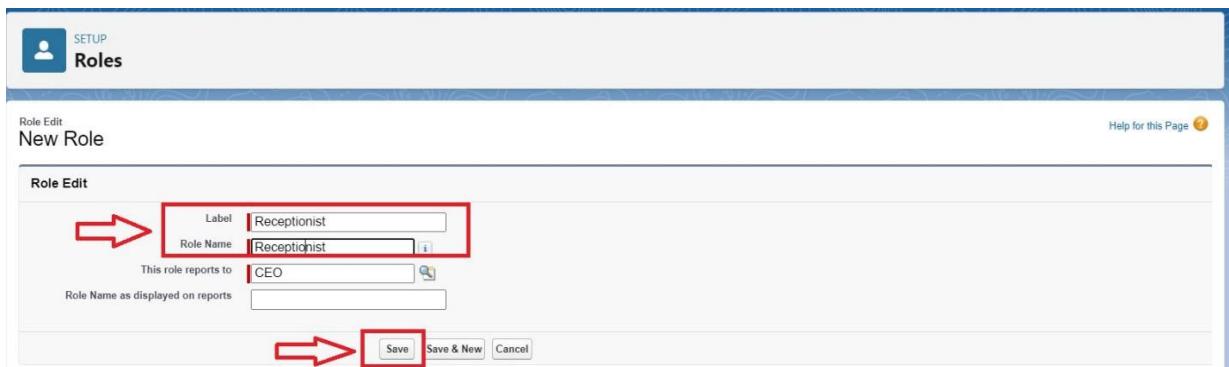
3. Give Label as "Marketing" and Role name gets auto populated.



4. Then click on Save.

Receptionist Role

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



4. Then click on Save.

Users

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

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 options like 'Permission Set Groups', 'Profiles', 'Public Groups', etc. A red box highlights the 'User' link. The main area is titled 'All Users' and contains a table of existing users. At the top of this table, there are three buttons: 'New User', 'Reset Password(s)', and 'Add Multiple Users'. A red arrow points from the 'User' link in the sidebar 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 a header 'User Edit' with 'Save', 'Save & New', and 'Cancel' buttons. Below is a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, and Nickname. To the right, there's a large section for 'Role' and other user details. A red box highlights the 'Role' dropdown set to 'CEO'. Another red arrow points to the 'General Information' section.

Field	Value
First Name	sandeep
Last Name	gujja
Alias	sgujj
Email	sandeep@gmail.com
Username	gsandeep@sunny.com
Nickname	sunny

Role: CEO

User License: Salesforce

Profile: Custom user

Active: ✓

1. save.

Create Another User

1. Go to setup > type users in quick find box > selectusers > clickNew user.

2. Fill in the fields

- a. First Name : Abhilash
- b. Last Name : garapati
- c. Alias : Give a Alias Name
- d. Email id : Give your Personal Email id
- e. Username : Username should be in this form: text@text.com
- f. Nick Name : Give aNickname
- g. Role : Marketing
- h. User licence: Salesforce platform
- i. Profiles : Custom Platform User1

3. save

Create Another User

1. Go to setup > type users in quick find box > selectusers > clickNew user.

2. Fill in the fields

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

User Adoption

Create a Record (Customers)

1. Click on the Customers Tab.
2. Click new andfill details & Save

View a Record(Customers)

1. Click on App Launcher on the left side of the screen.
2. Search Home Feels & click on it.
3. Click on Customer Tab.
4. Click on anyrecord name. you can see the details of the Customer.

The screenshot shows the 'Customers' tab selected in the top navigation bar. The main content area displays the details for a customer named 'sandeep'. A red box highlights the 'Details' section, which contains the following information:

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

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 'Customers' tab selected in the top navigation bar. The main content area displays a list of recently viewed customers. A red box highlights the 'sandeep' entry. Another red box highlights the delete icon (a small trash bin) in the bottom right corner of the list row. A third red box highlights the 'Delete' button in the bottom right corner of the entire list panel.

Reports

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

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

Create Report

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

The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with links for Home, Customers, Room Bookings, Payments, Food Selections, Feedbacks, Reports (which is currently selected), and Dashboards. Below the navigation bar, there's a search bar labeled 'Search recent reports...' and a 'New Report' button. On the left, there's a sidebar with categories: Reports, Recent (which is selected), Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of recent reports. The columns are: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are three rows of data:

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

3. Select report type from category or from report type panel or from search panel “Customers with Room Bookings with Total Rooms” > click on start report.
4. Customize your report
5. Add fields from left pane as shown below.

The screenshot shows a report configuration interface. On the left, there's a sidebar with 'Fields' sections for 'Groups' (containing 'Customer Name') and 'Columns' (containing 'Room No.', 'Phone no.', 'Email id', etc.). In the center, a preview table lists customer bookings with columns for Customer Name, Room No., Phone no., Email id, Permanent Address, current Status, Room sharing, Advance payment for 1month, AC - 3000, and Amount. A red arrow points to the 'Customer Name' field in the Groups section. Another red arrow points to the 'Total' row in the Subtotal section. In the top right, there are buttons for Save (highlighted with a red box), Run, Close, and Update Preview Automatically.

6. Save or run it.

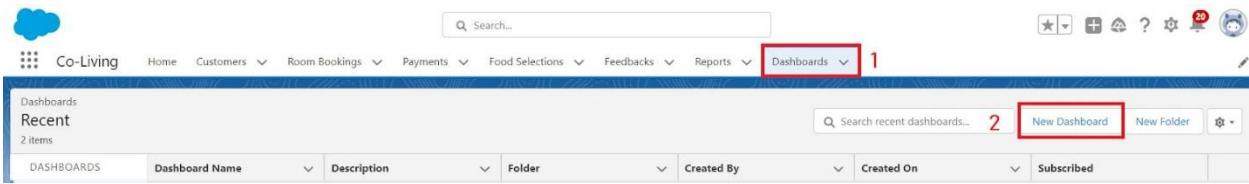
Create another Report

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.

Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-timedata you've gatheredwith 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.

Create Dashboard



1.

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

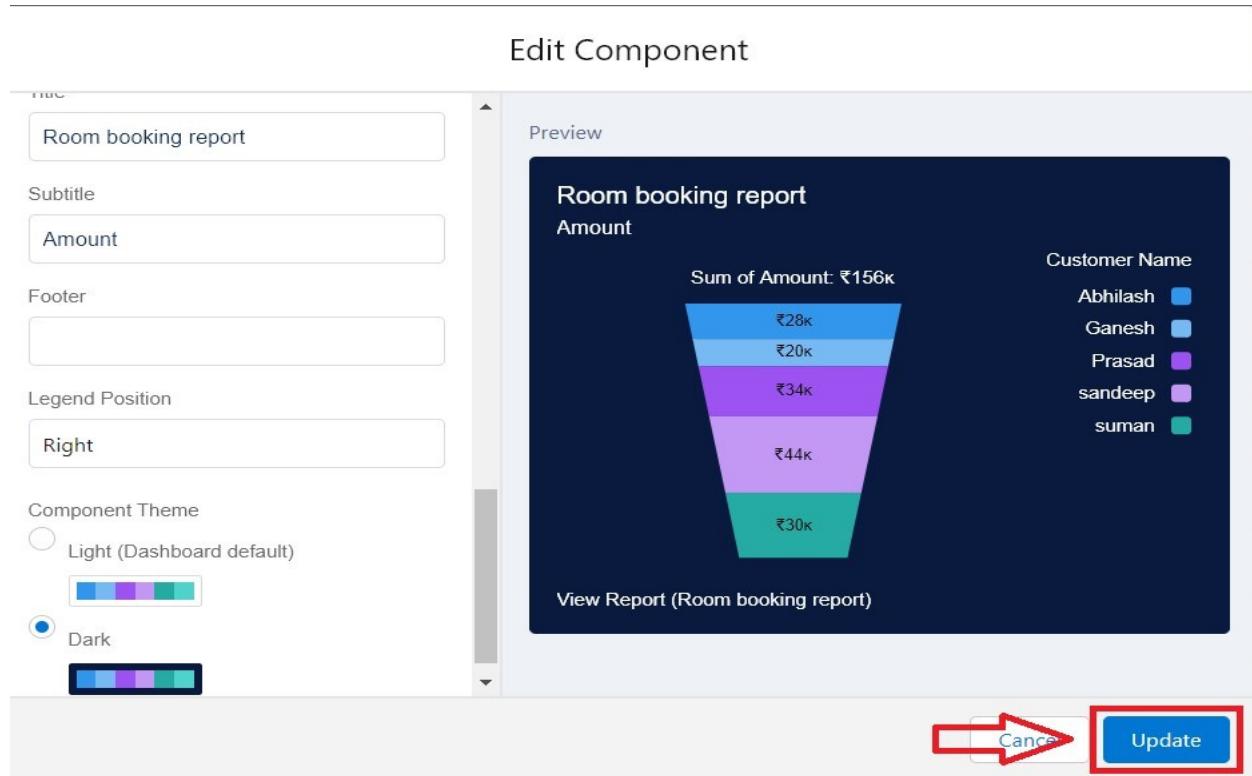
2. Give a Name and click on Create.

3. Select add component.

A screenshot of a 'Select Report' dialog box. On the left, there is a sidebar with sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'Folders' (Created by Me, Shared with Me, All Folders). The main area is titled 'Select Report' and contains a search bar 'Search Reports and Folders...' and a 'Reports and Folders' dropdown. A list of reports is shown: 'Room booking report' (Veera Venkata Varaprasad Androthu - 14-Jun-2023, 2:58 pm - custom report), 'Room booking report' (Veera Venkata Varaprasad Androthu - 07-Jun-2023, 4:53 pm - Private Reports), and 'Sample Flow Report: Screen Flows' (Automated Process - 05-Jun-2023, 10:09 am - Public Reports). The first report is highlighted with a red box and a red arrow points to it. In the bottom right corner of the dialog box, there are 'Cancel' and 'Select' buttons, with 'Select' also highlighted with a red box.

4.

Select a Report Customerwith Room Bookingand click on select.



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

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 ReportCustomer with Room Booking with Payments and click on select.
5. Click Add then click on Save and then click on Done.

Flows

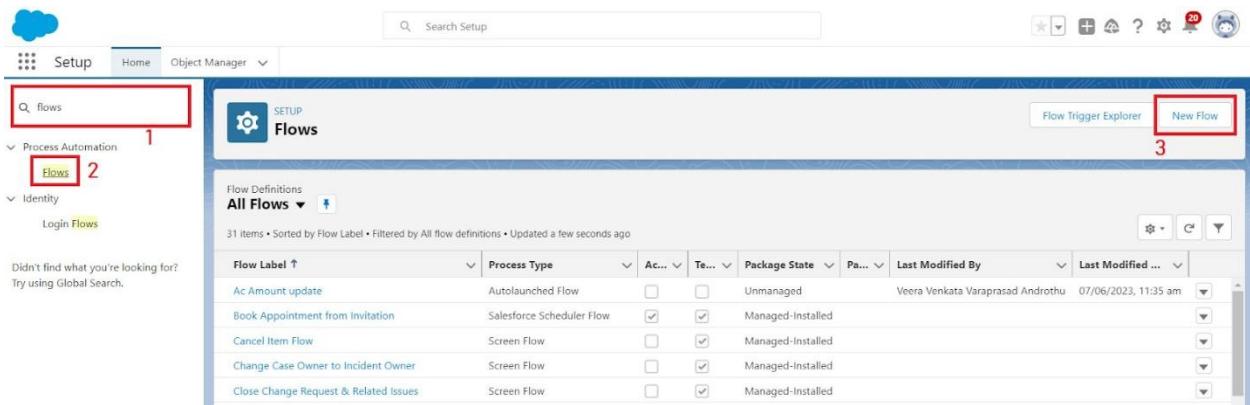
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Why do we need to create a flow:

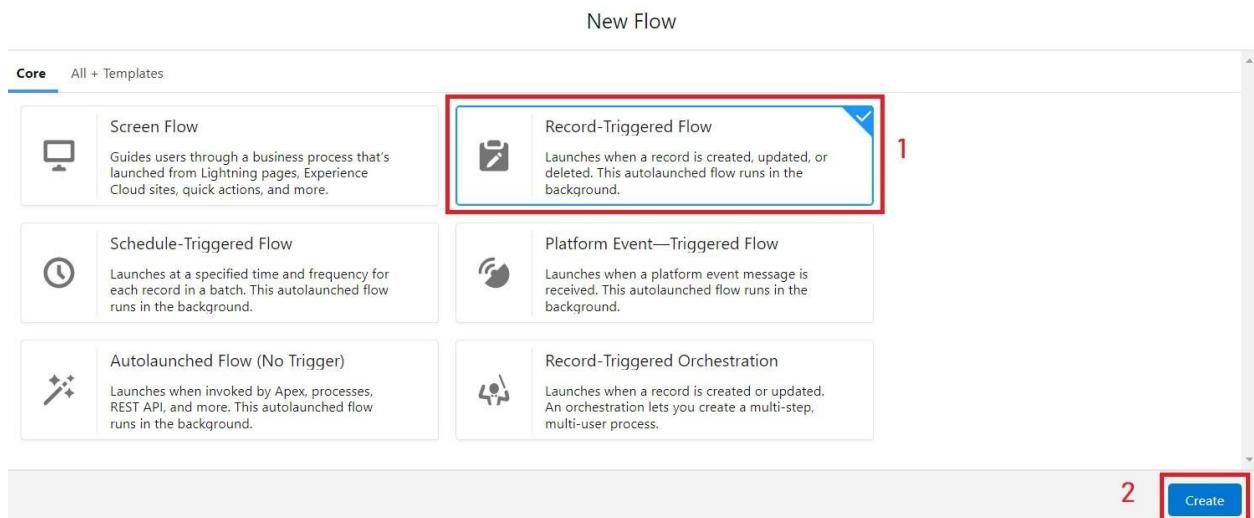
To get the Amount Field automatic by the selection of the Room sharing and Ac fields the Amount is generated Automatically in the amount field.

Create a Flow

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



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



2. Select the Object as a Room Booking in the Drop down list.

3. Select the Trigger Flow when: “A record is Created or Updated”.
4. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
5. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.
6. Enter the Details Label: Field should be Update, API name: Gets Automatically Generated.
7. Enter the Outcome DetailsLabel: Single sharing, OutcomeAPI name: Gets Automatically Generated.
 - a. Resource: Select Record.Room sharing.
 - o Operator: Select Equals.
 - o Value: Select Single sharing.
 - o Click on “Add Condition”
 - o Resource: Select Record.AC-3000.
 - o Operator: Select Equals.
 - o Value: Select False.
 - o Click on “+” Symbol In the Outcome Order.

New Decision

* Label Field Should be Update	* API Name Field_Should_be_Update															
Description 1																
Outcomes For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.																
OUTCOME ORDER + OUTCOME DETAILS <table border="1"> <tr> <td>* Label Single Sharing</td> <td>* Outcome API Name Single_Sharing</td> </tr> <tr> <td colspan="2">Default Outcome</td> </tr> <tr> <td colspan="2"> Condition Requirements to Execute Outcome All Conditions Are Met (AND) 3 <table border="1"> <tr> <td>Resource \$Record > Room sharing X</td> <td>Operator Equals</td> <td>Value single sharing</td> </tr> <tr> <td>Resource \$Record > AC - 3000 X</td> <td>Operator Equals</td> <td>Value False X</td> </tr> <tr> <td colspan="3">+ Add Condition</td> </tr> </table> </td> </tr> </table>		* Label Single Sharing	* Outcome API Name Single_Sharing	Default Outcome		Condition Requirements to Execute Outcome All Conditions Are Met (AND) 3 <table border="1"> <tr> <td>Resource \$Record > Room sharing X</td> <td>Operator Equals</td> <td>Value single sharing</td> </tr> <tr> <td>Resource \$Record > AC - 3000 X</td> <td>Operator Equals</td> <td>Value False X</td> </tr> <tr> <td colspan="3">+ Add Condition</td> </tr> </table>		Resource \$Record > Room sharing X	Operator Equals	Value single sharing	Resource \$Record > AC - 3000 X	Operator Equals	Value False X	+ Add Condition		
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Resource \$Record > Room sharing X	Operator Equals	Value single sharing														
Resource \$Record > AC - 3000 X	Operator Equals	Value False X														
+ Add Condition																
Cancel Done																

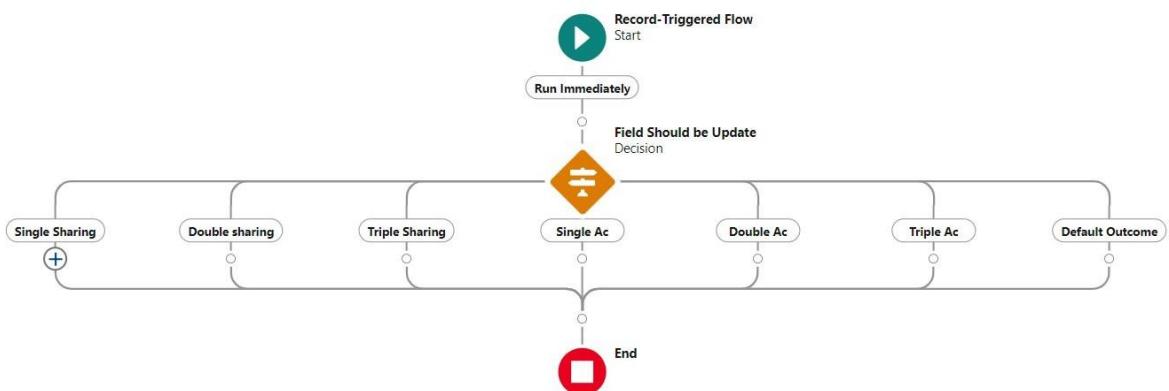
- Enter the OutcomeDetails Label: Doublesharing, Outcome API name: Gets Automatically Generated.
 - Resource: Select Record.Room sharing.
 - Operator: Select Equals.
 - Value: Select Doublesharing.
 - Click on “Add Condition”
 - Resource: Select Record.AC-3000.
 - Operator: Select Equals.
 - Value: Select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

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

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

- Enter the Outcome Details Label: TripleAc, Outcome API name: Gets Automatically Generated.

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



1. Click on “+” Symbol under the single sharing and Select the “update Records” in the drop down list.
2. Enter the update records details
 - a. Label: Single.
 - b. API name: Gets automatically Generated.
 - c. Under the Set Field Valuesfor the Room Booking Record.
 - d. Field: Amount.
 - e. Value: 28000.
 - f. Click on Done.
3. Enter the update records details
 - a. Label: Double.
 - b. API name: Gets automatically Generated.
 - c. Under the Set Field Valuesfor the Room Booking Record.
 - d. Field: Amount.
 - e. Value: 24000.
 - f. Click on Done.
4. Enter the update records details
 - a. Label: Triple.
 - b. API name: Gets automatically Generated.
 - c. Under the Set Field Valuesfor the Room Booking Record.
 - d. Field: Amount.
 - e. Value: 20000.
 - f. Click on Done.
5. Enter the update records details
 - a. Label: Single ac1.
 - b. API name: Gets automatically Generated.
 - c. Under the Set Field Valuesfor the Room Booking Record.

d. Field: Amount.

e. Value: 34000.

f. Click on Done.

6. Enter the update records details

a. Label: Double ac1.

b. API name: Gets automatically Generated.

c. Under the Set Field Valuesfor the Room Booking Record.

d. Field: Amount.

e. Value: 30000.

f. Click on Done.

7. Enter the update records details

a. Label: Triple ac1.

b. API name: Gets automatically Generated.

c. Under the Set Field Valuesfor the Room Booking Record.

d. Field: Amount.

e. Value: 26000.

f. Click on Done.

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

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

Conclusion:

The CRM application for managing bookings in your co-living space is an essential tool to streamline and enhance the customer experience. It will allow you to efficiently manage and store customer details, enabling residents to easily choose from different air-conditioned rooms with multiple sharing options. The platform will also enable users to select special food items on a daily basis, catering to their individual preferences. Additionally, the application will support multiple payment modes, ensuring flexibility and convenience for residents. Moreover, the feedback feature will empower residents to provide insights into the quality of services, such as room cleaning, internet connectivity, and food services, which will help maintain and improve service standards. Overall, this CRM system will not only foster a seamless living experience but also reinforce the values of collaboration, comfort, and community that are at the core of the co-living concept. By balancing privacy and communal living, the application will support the creation of a vibrant and inclusive environment, allowing individuals to connect, thrive, and enhance their quality of life.