

A CRM Application to Manage the Booking of Co-Living

Introduction:

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

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

Salesforce:

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

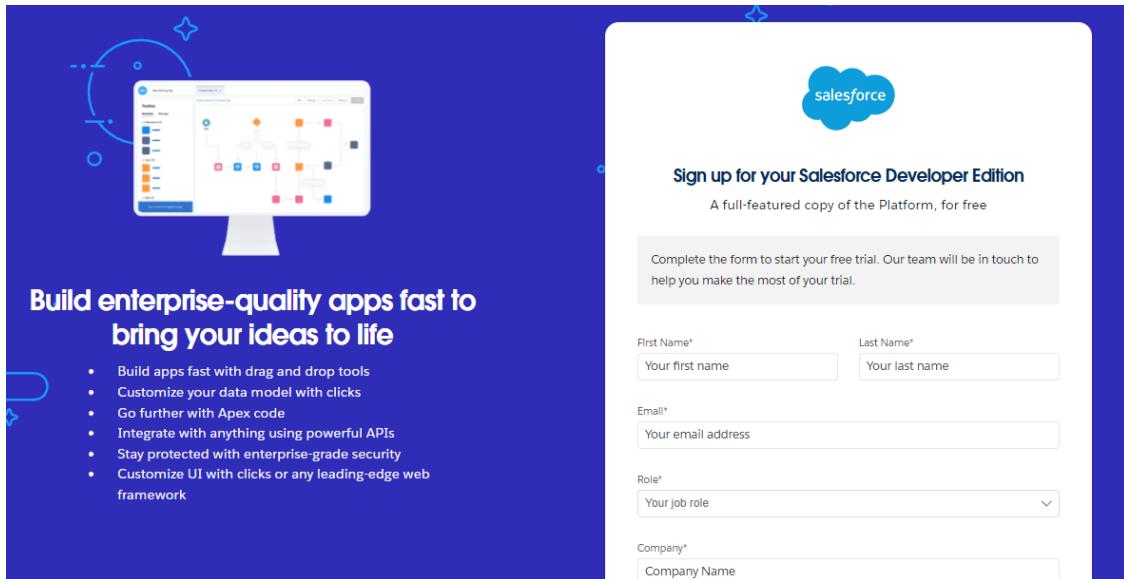
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

In this we need to perform the following the steps:

1. Creating Developer Account:

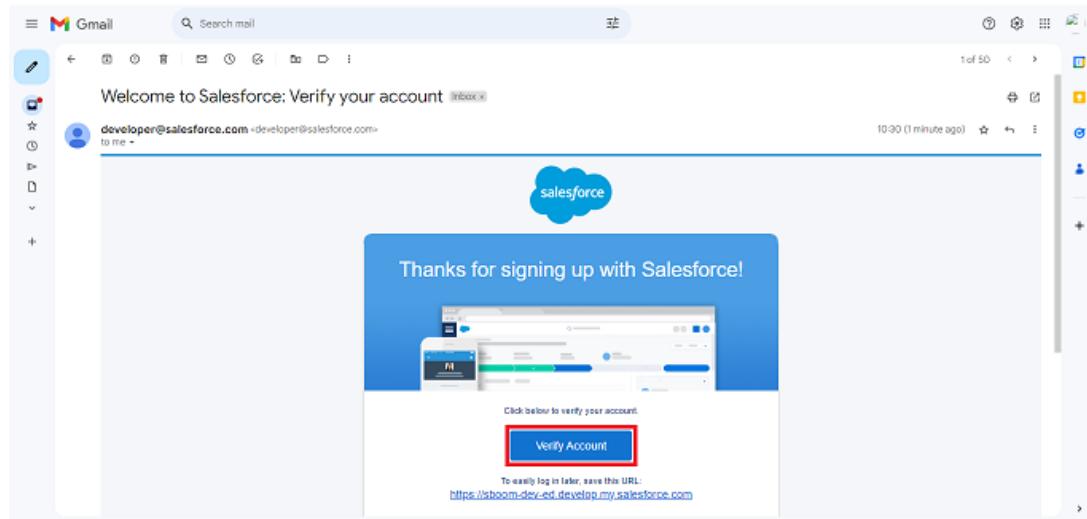
Creating a developer org in salesforce.

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



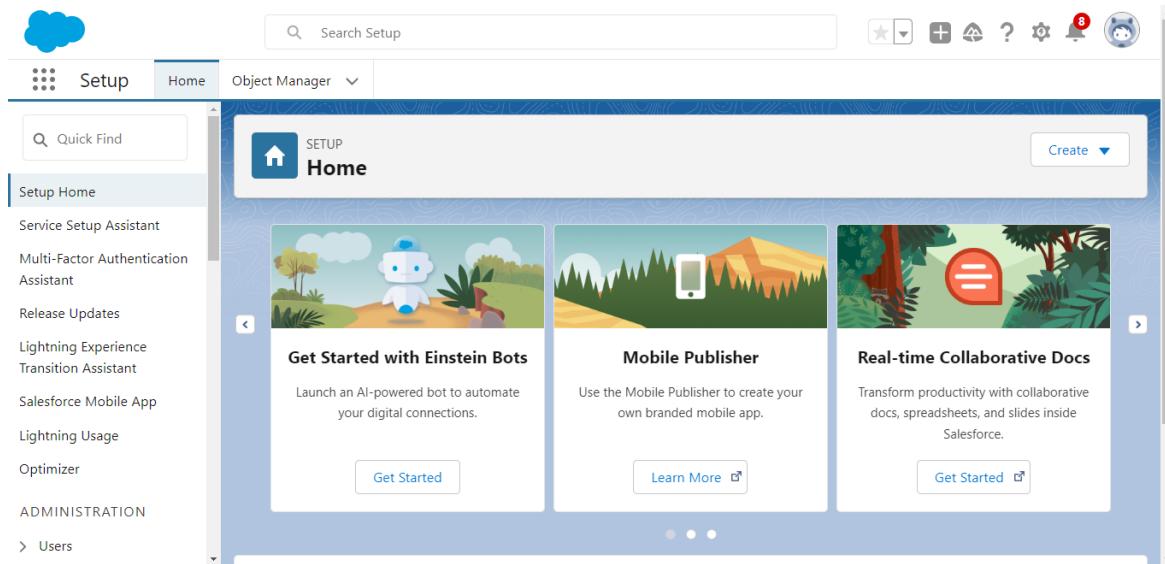
2. On the sign up form, enter the following given details and click on signup.

3. After few minutes, then we will get an email to activate the account.



4. Activate the account.

5. Then we will redirect to salesforce setup page.



Object:

What is an object?:

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

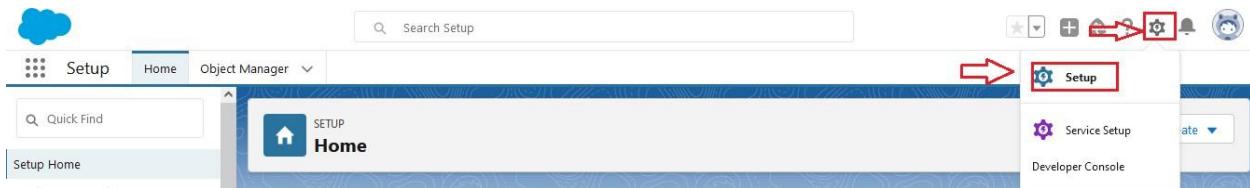
- 1. Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- 2. Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

Then we need to perform these operations:

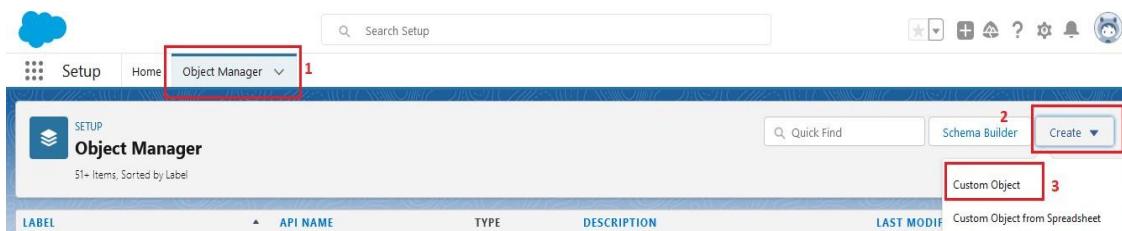
1.Create a custom object for Total Rooms:

To create a custom object we need to perform these steps:

1. Click create, select custom object.



2. Click create, select custom object.



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

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, name layouts, and reports.

Label: Total Room **Example:** Account **Plural Label:** Total Rooms **Example:** Accounts **Starts with vowel sound:**

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

Object Name: Total_Rooms **Example:** Account **Description:**

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

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, lists, related lists, 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: Total No Of Rooms **Example:** Account Name **Data Type:** Text

11. Leave everything as same and click on save.

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 SOQL 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

Save **Save & New** **Cancel**

2. Create a custom object for Customer:

To create a custom object for a customer perform these steps:

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

5. Record name: "Customer Name"
6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History.
8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
11. Leave everything as same and click on save.

3.Create a custom object for Room Booking:

To create a custom object for room booking perform these steps:

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

10. In the Optional Features section, select Allow Reports and Track Field History.
11. In the Deployment Status section, ensure Deployed is selected.
12. In the Search Status section, select Allow Search.
13. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
14. Leave everything as same and click on save.

4. Create a custom object for Payment:

To create a custom object for a payment perform these steps:

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as " Payment1".
4. Fill in the plural label as " Payments".
5. Record name: " Payment type "
6. Select the data type as "Auto Number".
7. under Display format enter RN-{000}
8. Enter starting Number as 1.
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.

12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

13. Leave everything as same and click on save.

5. Create a custom object for Food Selection:

To create a custom object for a food selection perform these steps:

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

6. Create a custom object for Feedback:

To create a custom object for a feedback perform these steps:

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

Tab:

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

Types of Tabs:

1. Custom Tabs:

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

5. Lightning Page Tabs

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

These involves the following steps for creating tabs for different ones like:

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).

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The 'Custom Tabs' tab is highlighted with a red box. Below it, the 'Data' tab is also highlighted with a red box. At the top right of the list table, there is a 'New' button, which is also highlighted with a red box.

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

The screenshot shows the 'New Custom Object Tab' setup screen. The 'Object' dropdown is set to 'Total Room', and the 'Tab Style' selector is open, showing various options like Airplane, Alarm clock, etc. A red arrow points from the 'Object' dropdown to the 'Tab Style' selector.

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

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

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

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

Append tab to users' existing personal customizations

2. Create a Tab for Customers:

To create a Tab:(Customers):

- 1.Go to setup page
2. type Tabs in Quick Find bar.

- 3.click on tabs
- 4.New (under custom object tab)
- 5.Select Object(Customers)
6. Select the tab style.
- 7.Next (Add to profiles page) keep it as default
- 8.Next (Add to Custom App) keep it as default
- 9.Save.

3. Creating a Tab for Room Booking:

To create a Tab:(Room Booking):

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

4.Creating a Tab for Payments:

To create a Tab:(Payments):

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

9.Save.

5.Creating a Tab for Food Selections:

Use the same methods for creating a tab for food selection using the same above steps.

6.Creating a Tab for Feedback:

Use the same methods for creating a tab for feedback using the same above steps.

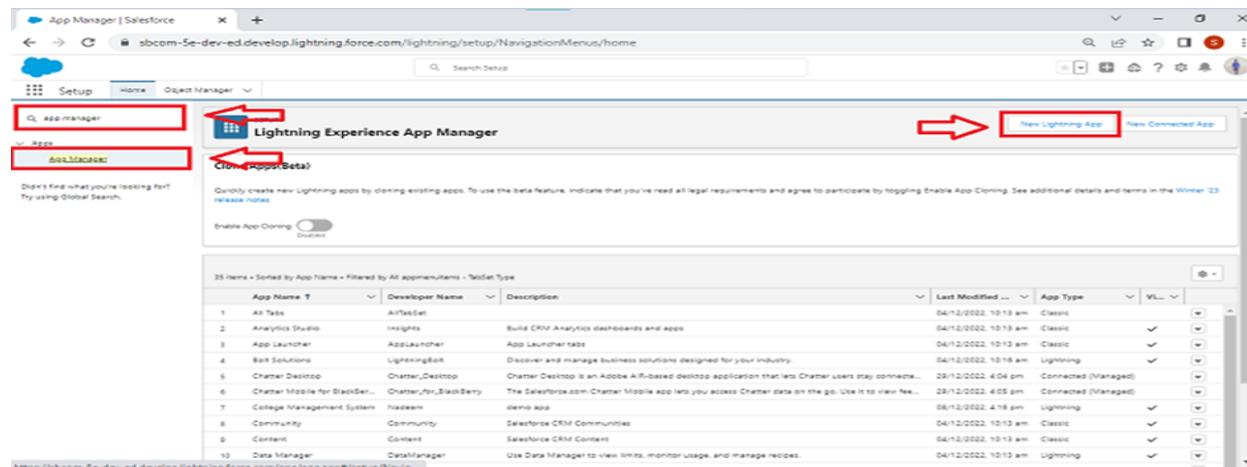
The Lightning App:

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.

Creating a Lightning App:

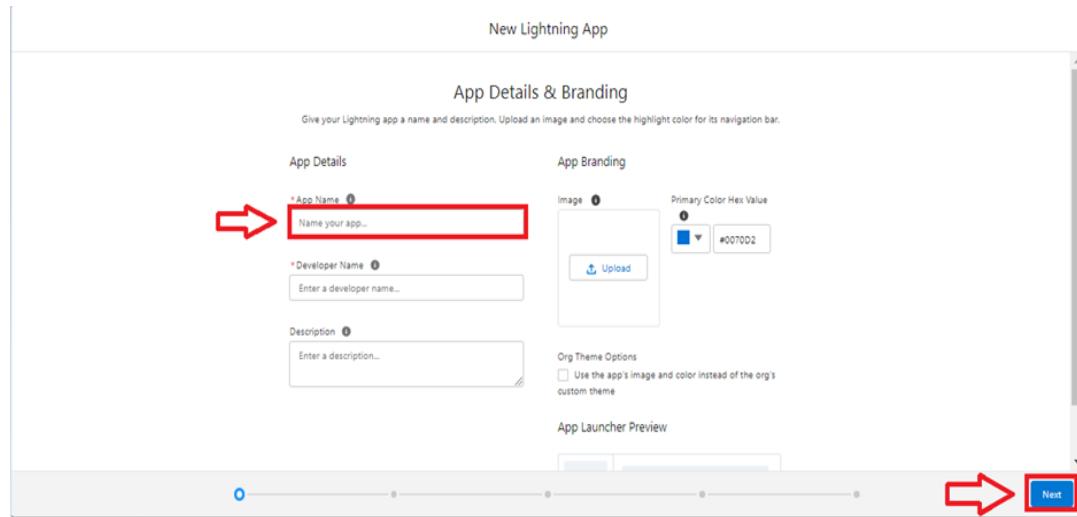
1. Go to setup page and search “app manager” in quick find then select “app manager” and then click on New lightning App.



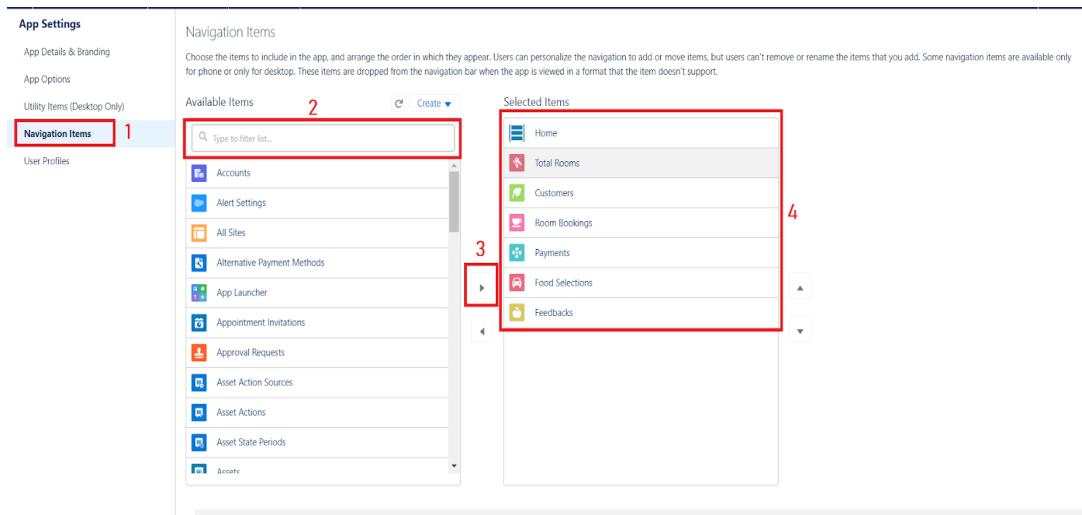
The screenshot shows the Salesforce App Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it, a search bar says 'Search Setup'. On the left, there are three red-highlighted menu items: 'App Manager', 'Apps', and 'Available'. A red arrow points to the 'New Lightning App' button at the top right of the main content area. The main content area displays a table of existing apps, with the first few rows listed below:

App Name	Developer Name	Description	Last Modified	App Type
All Tabs	ArifSaeed	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:18 am	Lightning
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected to their social network from their desktop. It includes features like news feeds, messaging, and sharing.	29/12/2022, 4:04 pm	Connected (Managed)
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view news feeds, message, and share files.	29/12/2022, 4:05 pm	Connected (Managed)
College Management System	Nadeem	demo app	08/12/2022, 4:18 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage records.	04/12/2022, 10:13 am	Lightning

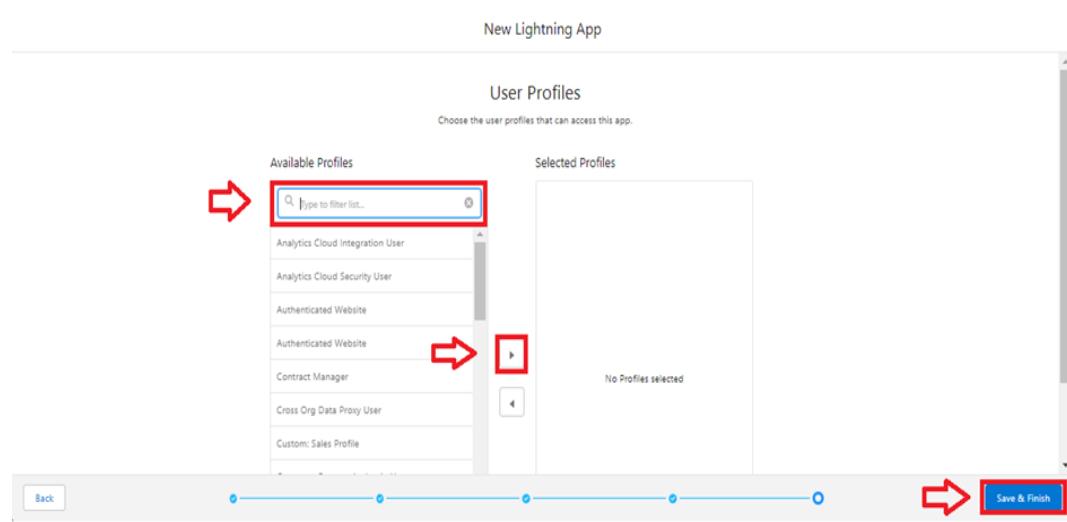
- Fill the app name in app details and branding and then Next on App option page , keep it as default and click on Next and make Utility Items as keep it as default then click again Next.



- 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 and then Next.



- To add users, search profiles (System administrator) in the search bar > click on the arrow button > save & finish.



Fields & Relationships

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

Types of Fields

1. Standard Fields

2. Custom Fields

Standard Fields:

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

the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

1. Created By
2. Owner
3. Last Modified
4. Field Made During object Creation

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

1. Creation of fields for the customer1 object:

1. To create a fields in an object:

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

Object Manager			
103+ items. Sorted by Label			
Credential Stuffing Event Store	CredentialStuffingEventStore	Standard Object	
Credit Memo	CreditMemo	Standard Object	
Credit Memo invoice Application	CreditMemoInvApplication	Standard Object	
Credit Memo Line	CreditMemoLine	Standard Object	
Customer	Customer	Standard Object	
Customer1	Customer__c	Custom Object	12/06/2023 ✓
D&B Company	DandBCompany	Standard Object	
Data Use Legal Basis	DataUseLegalBasis	Standard Object	
Data Use Purpose	DataUsePurpose	Standard Object	
Digital Wallet	DigitalWallet	Standard Object	
Duplicate Record Item	DuplicateRecordItem	Standard Object	
Duplicate Record Set	DuplicateRecordSet	Standard Object	
Email Message	EmailMessage	Standard Object	

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

Fields & Relationships				
8 Items. Sorted by Field Label				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current Status	current_Status__c	Picklist		
Customer Name	Name	Text(80)	✓	
Email id	Email_id__c	Email (Unique)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

3. Select Data Type as a “Phone”.

Customer1

Fields & Relationships

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone** (highlighted with a red box)
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URL

Click next.

Customer1

Edit Customer1 Custom Field
Phone no

Field Information

Field Label:	Phone no
Field Name:	Phone_no

General Options

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

Default Value:

Save

4. Field Label: Phone no

5. Field Name : gets auto generated

6. Click on Next and then Next and Save and new.

2. To create another fields in an object:

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

2. Now click on “Fields & Relationships” then New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
5. Field Label: Email
6. Field Name :It’s gets auto generated
7. Click on Next then Next then Save and new.

3. To create another fields in an object:

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

4. To create another fields in an object:

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

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

Student

Employee

Others

7. Select required

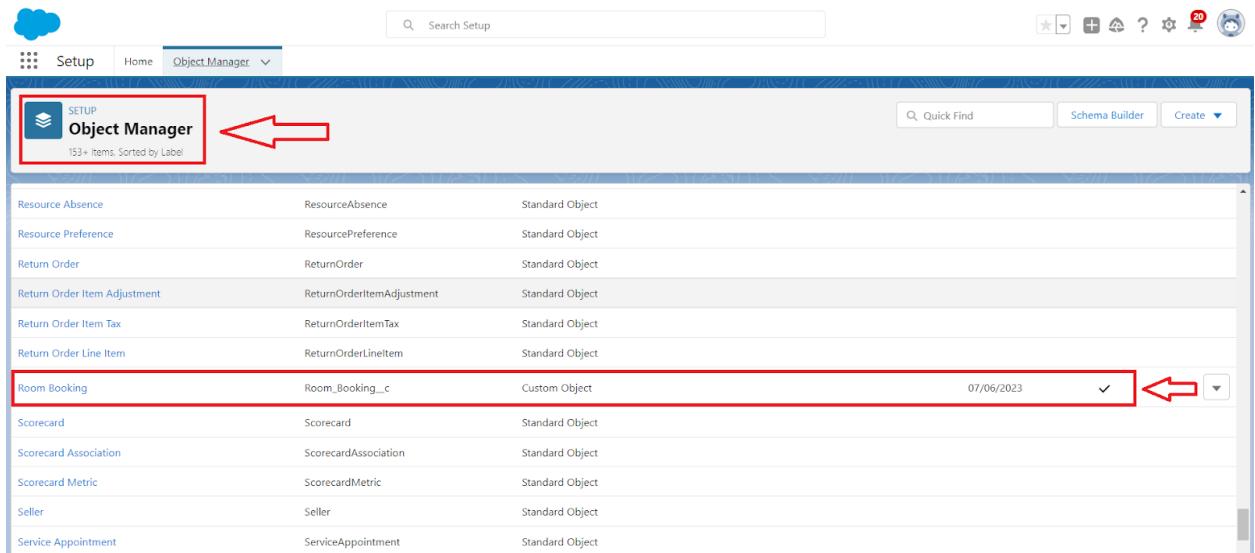
8. Field Name : It's gets auto generated

9. Click on Next then Next and then Save and new.

1. Creation of fields for the Room Booking object:

1. To create fields in an object:

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



The screenshot shows the Salesforce Object Manager interface. At the top, there is a navigation bar with 'SETUP' and 'Object Manager'. Below the navigation bar, a search bar contains the text 'Object Manager'. A red box highlights the 'Object Manager' label, and a red arrow points to it from the left. Another red box highlights the 'Room Booking' row in the list, and a red arrow points to the dropdown menu next to its name. The list of objects includes:

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

2. Now click on “Fields & Relationships” then 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 “Picklist”.

Setup > Object Manager

Room Booking

Fields & Relationships

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

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

4.click on next

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

Default Value: [Show Formula Editor](#)

5.Field Label: Room Sharing

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

Single sharing

Double sharing

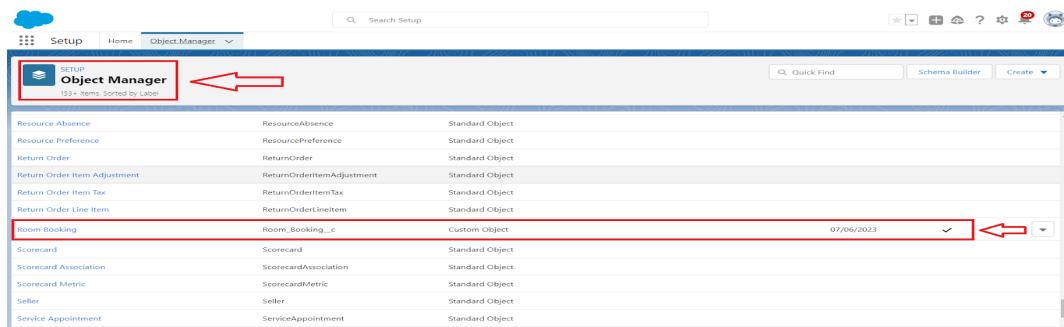
Triple sharing

7.Select required and then click on next and next and save and new.

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

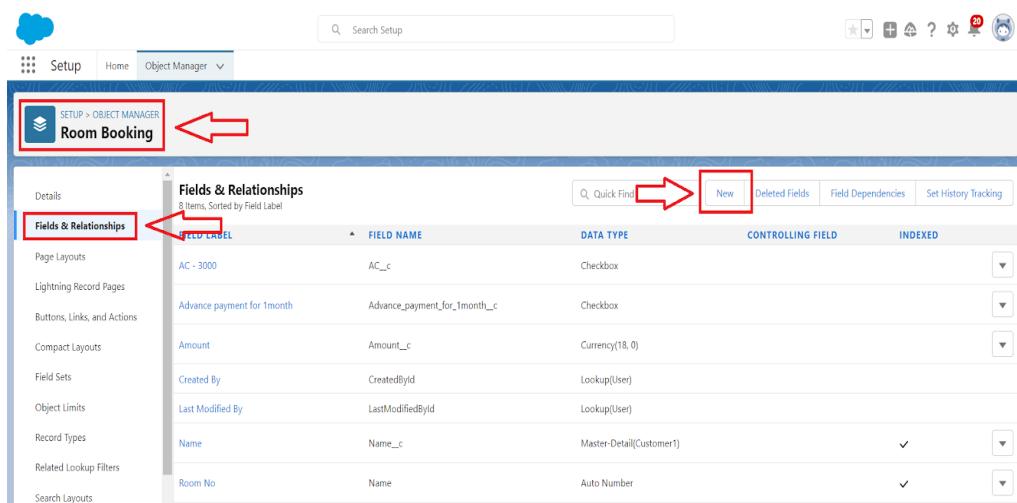
To create fields & relationship to an object:

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



The screenshot shows the Salesforce Object Manager interface. A red box highlights the 'Object Manager' tab in the top navigation bar. Another red box highlights the 'Room Booking' object in the list below, which is identified as a 'Custom Object'. A red arrow points from the 'Object Manager' tab to the 'Room Booking' object.

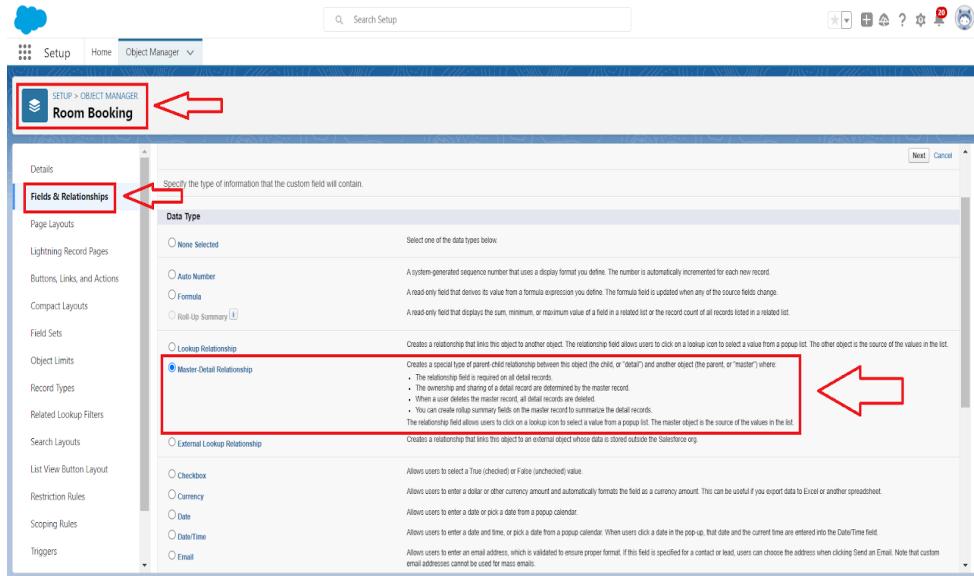
2.Now click on “Fields & Relationships” > New.



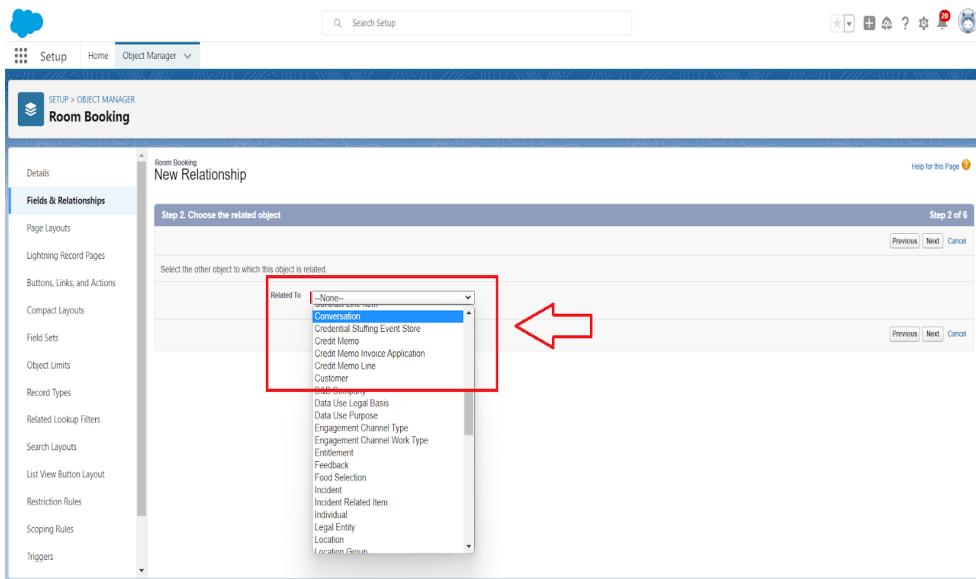
The screenshot shows the 'Fields & Relationships' page for the 'Room Booking' object. A red box highlights the 'Room Booking' object in the top left. Another red box highlights the 'Fields & Relationships' tab in the left sidebar. A third red box highlights the 'New' button at the top right of the main table area. A red arrow points from the 'Room Booking' object to the 'Fields & Relationships' tab.

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

4. Click on Next.

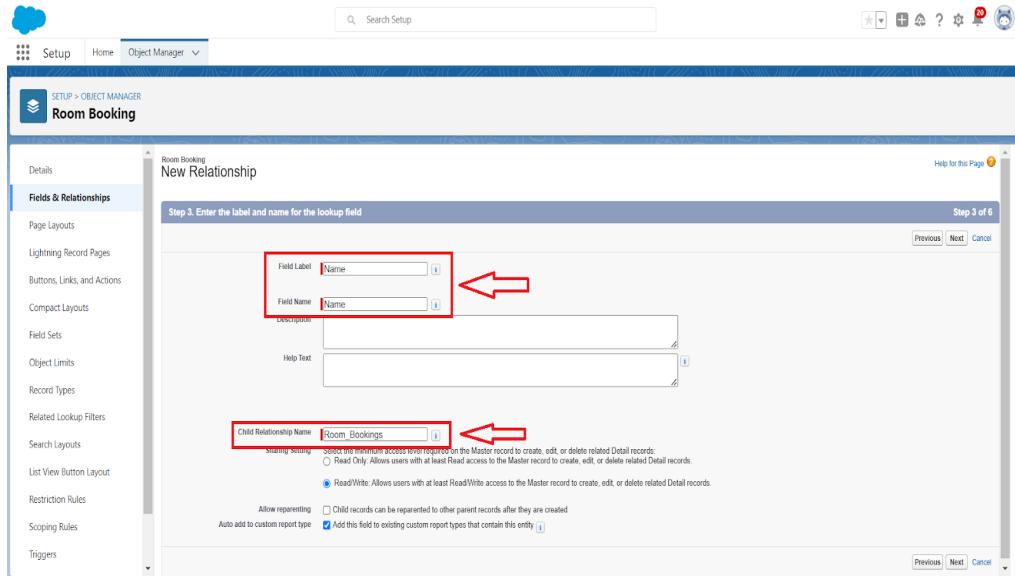


5. Click on the Related to drop down and Select the “Customer1” object and next



6. Change the Field Label: Name

7. Field Name : It's gets auto generated



8.click next,next and save and new.

3. To create fields in an object:

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

4. To create fields in an object:

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

search bar > click on the object.

2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Checkbox”
4. Click on Next
5. Fill the Above as following:
 - Field Label: Advance Payment for 1 Month
 - Field Name :It’s gets auto generated
 - Click on Next > Next > Save and new

5. To create fields in an object:

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

6. To Create a Fields & Relationship to an Object

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

2. Now click on “Fields & Relationships” then New
3. Select Data Type as a “Master-detail Relationship”
4. Click on Next
5. Click on the Related to drop down and Select the “Total Rooms” object and click next.

- Fill the Above as following:
- Change the Field Label: Total No Of Rooms
- Field Name :It's gets auto generated
- Click on Next > Next > Save and new.

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

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

Total Room
New Custom Field

Help for this Page

Step 3. Define the summary calculation Step 3 of 5

Previous Next Cancel

Select Object to Summarize

Master Object: Total Room
Summarized Object: Room Bookings

I = Required Information

Select Roll-Up Type

COUNT
 SUM
 MIN
 MAX

Field to Aggregate: None

Filter Criteria

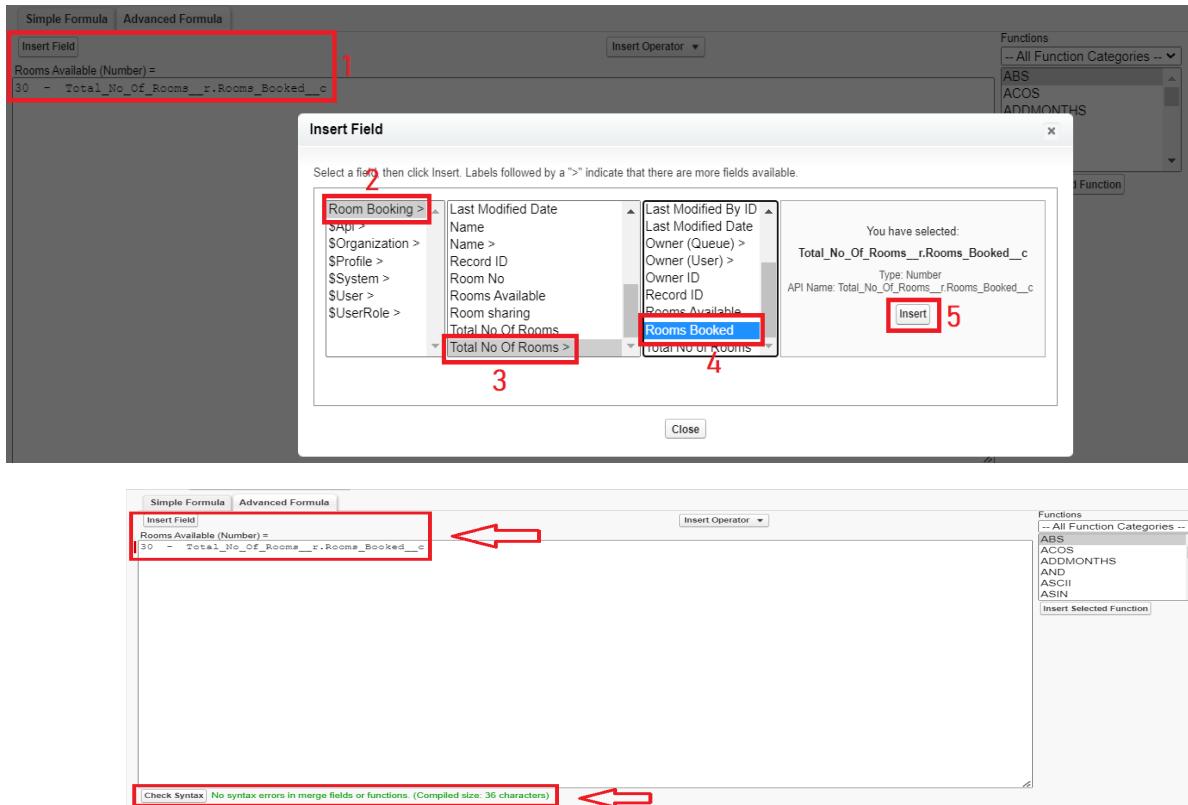
All records should be included in the calculation
 Only records meeting certain criteria should be included in the calculation

Previous Next Cancel

7.Click on next and then next and click on save and new.

8. To create fields in an object:

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



5.click next, next and save.

9. To create fields in an object:

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

10. To create fields in an object:

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

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

3. Select Data Type as a “Checkbox”

4. Click on Next

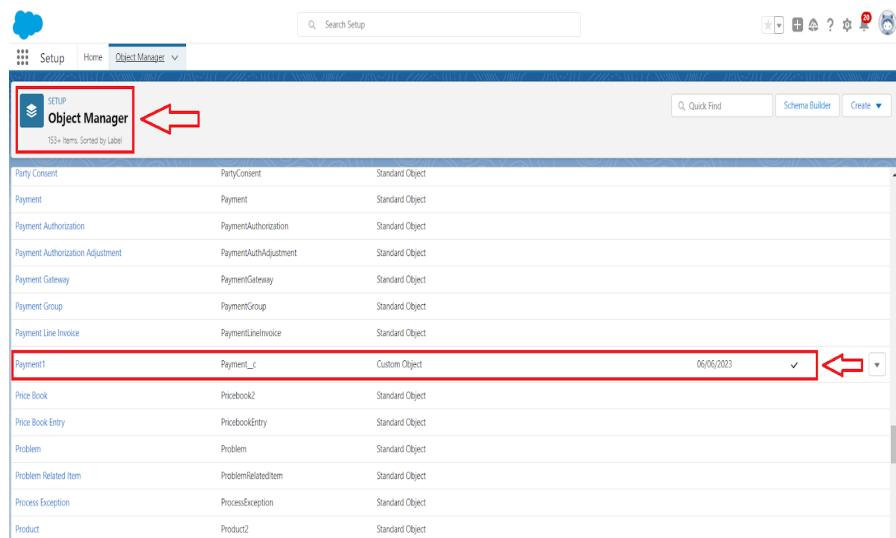
5. Fill the Above as following:

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

2. Creation of Fields & Relationship for Payment1 Object:

1. To create fields & relationship to an object:

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



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

Setup > Object Manager
Payment1

Fields & Relationships

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

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

Setup > Object Manager
Payment1

Fields & Relationships

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

Data Type

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

The 'Master-Detail Relationship' option is highlighted with a red box and a red arrow pointing to it from the left sidebar.

4. Click on Next

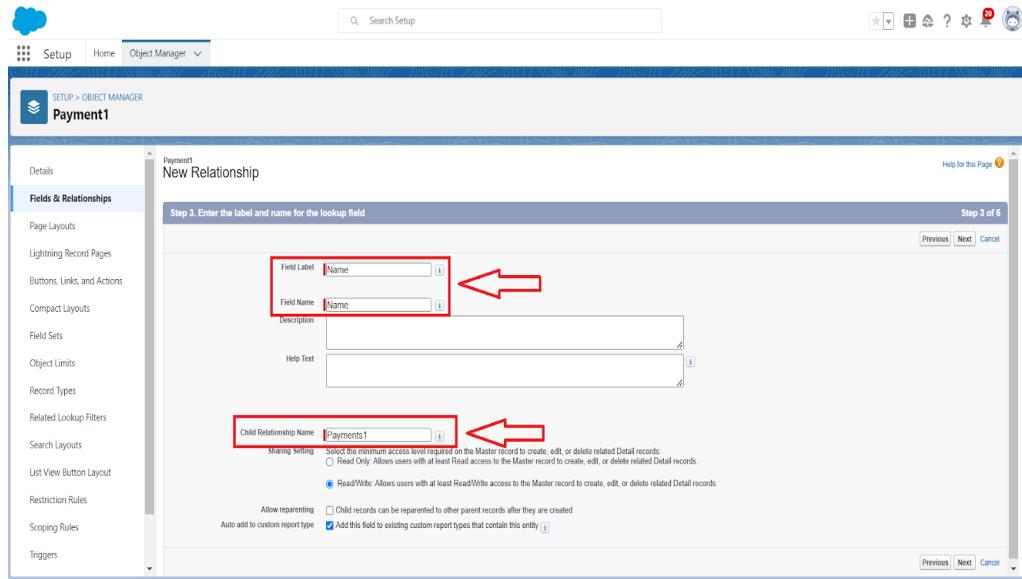
Setup > Object Manager
Payment1

Payment
New Relationship

Step 2. Choose the related object.

Related To:

Credit Memo Line
Customer
D&B Company
Data Use Legal Basis
Data Use Purpose
Engagement Channel Type
Engagement Channel Work Type
Entitlement
Feedback
Food Selection
Incident
Incident Related Item



5.Click on the Related to drop down and Select the Customer1 object and 6.

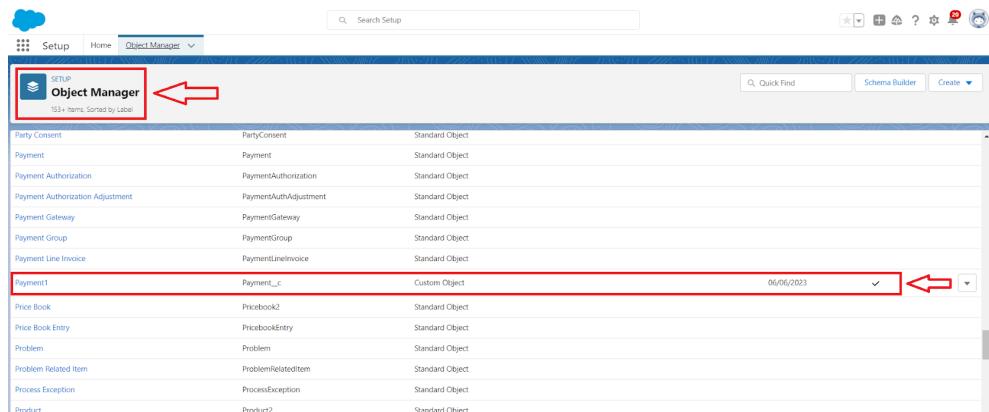
6.click on next

7. Fill the Above as following:

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

2. To create another fields & relationship to an object:

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



2.click on filed and relationships and then new.

SETUP > OBJECT MANAGER
Payment1

Details
Fields & Relationships **New** Deleted Fields Field Dependencies Set History Tracking

Fields & Relationships

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INDEXED

Amount	Amount__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Name	Name_c	Master-Detail(Customer1)	✓	
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number	✓	
Room Booking	Room_Booking_c	Lookup(Room Booking)	✓	

3.select data type as a "Lookup Relationship".

4.click on next.

SETUP > OBJECT MANAGER
Payment1

Details
Fields & Relationships **Next** Cancel

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

Data Type

None Selected Select one of the data types below

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

Formula 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.

Roll Up Summary 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.

Lookup Relationship Create a relationship field 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.

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

- The master record has a record or an 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.

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

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

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

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

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

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

Screenshot 1: Step 2. Choose the related object

In this step, the user is selecting the related object. The 'Related To' dropdown menu is open, showing several options. The 'Room Booking' option is highlighted with a blue selection bar, and a red arrow points to this selection.

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

In this step, the user is defining the lookup field properties. 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 a red arrow points to the 'Field Label' field.

Below these fields, the 'Child Relationship Name' is set to 'Payments1', which is also highlighted with a red box and has a red arrow pointing to it.

6.click on next

7.Fill the Above as following:

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

3. Creation of another fields for the Payment1 object

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

Payment Authorization	PaymentAuthorization	Standard Object
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object
Payment Gateway	PaymentGateway	Standard Object
Payment Group	PaymentGroup	Standard Object
Payment Line Invoice	PaymentLineInvoice	Standard Object
Payment1	Payment__c	Custom Object
Price Book	Pricebook2	Standard Object
Price Book Entry	PricebookEntry	Standard Object
Problem	Problem	Standard Object
Problem Related Item	ProblemRelatedItem	Standard Object
Process Exception	ProcessException	Standard Object
Product	Product2	Standard Object

2.click on filed and relationships and then 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(Customer)		✓
Payment ID	Payment_ID__c	Number(18, 0)		
Payment Mode	Payment_Mode__c	Picklist		
Payment no	Name	Auto Number		✓
Room Booking	Room_Booking__c	Lookup(Room Booking)		✓

3.select data type as a "picklist".

The first screenshot shows the 'Fields & Relationships' section of the Payment1 object setup. A red box highlights the 'Picklist' option under the 'Field Types' section, with a red arrow pointing to it. Another red box highlights the 'Enter values, with each value separated by a new line' option, with a red arrow pointing to it.

The second screenshot shows the detailed configuration for the 'Payment Mode' field. The 'Field Label' is set to 'Payment Mode'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected. A red box highlights the list of payment modes: Cash, Check, Credit card, Debit card, UPI, Phonepe, and Gpay. The 'Field Name' is 'Payment_Mode', and the 'Description' is empty. The 'Help Text' is also empty. The 'Required' checkbox is unchecked. The 'Auto add to custom report type' checkbox is checked. The 'Add this field to existing custom report types that contain this entity' checkbox is checked. The 'Default Value' section is collapsed.

4.click on next.

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

6.click on next

7.Fill the Above as following:



■ Change the Field Label: Payment Mode

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

Cash, Check, Credit card, Debit card, UPI, Phonepe, Gpay, Paytm

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

Cross Object Formula Field:

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

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

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

4. To create a Cross object formula Field in Payment1 Object:

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

2. click on file and relationships and then new.

3. select data type as a "Formula".

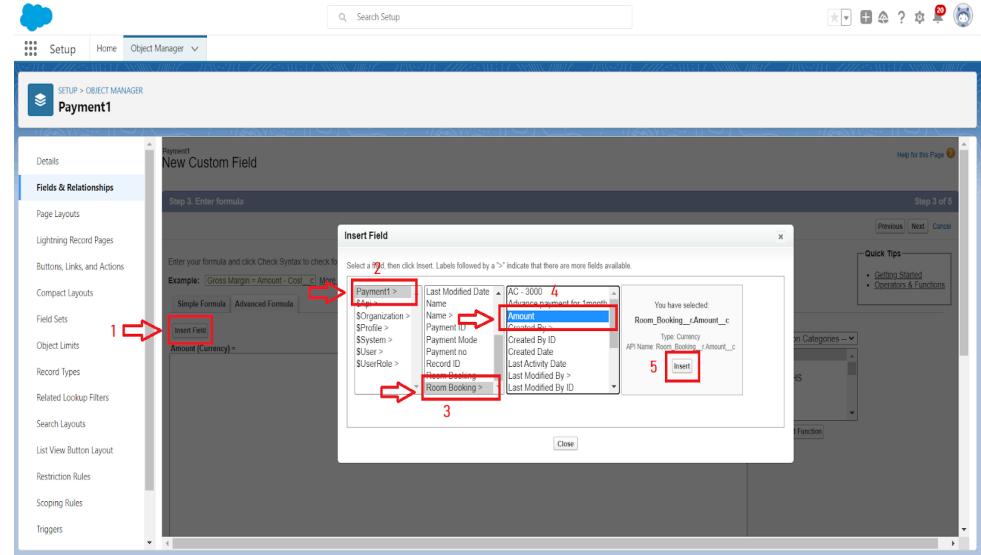
4. click on next.

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

6. click on next

7. Fill the Above as following:

- Change the Field Label: Room Booking
- Enter the Field label: Amount and Field name: gets auto generated and click on Next



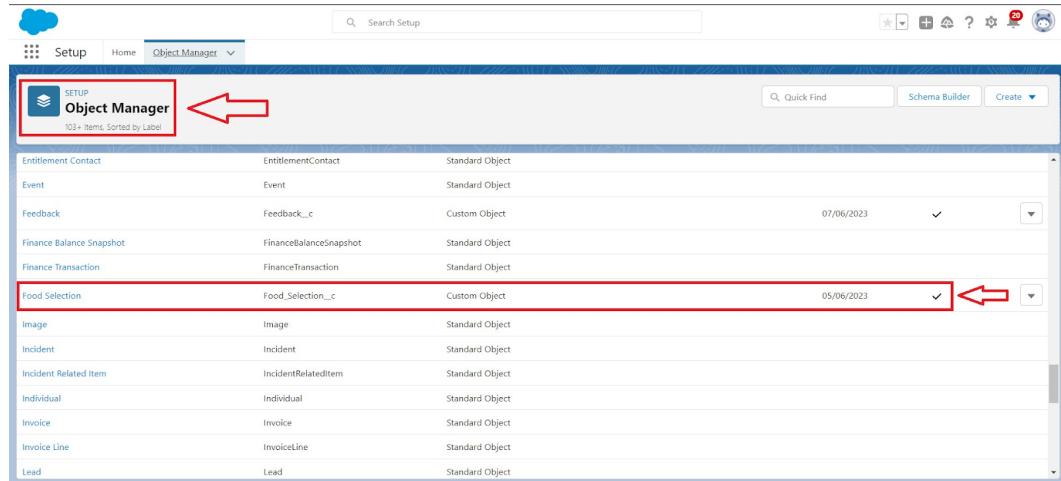
In the Advanced Formula Click on the Insert field in the popup Screen Select the Payment1 and in the second drop down select the Room Booking and in the three drop down select the Amount field and click on Insert “Room_Booking__r.Amount__c”.

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

3. Creation of fields for the Food Selection object

1. To create fields & relationship to 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 “Master-detail Relationship”
- d. Click on next.
- e. Click on the Related to drop down and Select the Customer1 object and click on Next.
- f. Fill the Above as following:
- g. Change the Field Label: Name
- h. Field Name :It's gets auto generated
- i. Click on Next > Next > Save and new.

Picklist value sets:

1.Create a picklist value set:

1. First click on gear icon and click on setup
2. Click on home tab in the Quick find box search for the “ Picklist value set”
3. Click on the Picklist value set and click on new
4. Enter the Label name and API name automatically Generate
5. Enter the values with each value separated by a new line

Sunday

Monday

Tuesday

Wednesday

Thursday

Friday

Saturday

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

2. Create a picklist Field for Food selection object:

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

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

3. Select Data Type as a “picklist”

4. Fill the Above as following:

5. Field Label: Breakfast

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

Click on next.

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

Click on next.

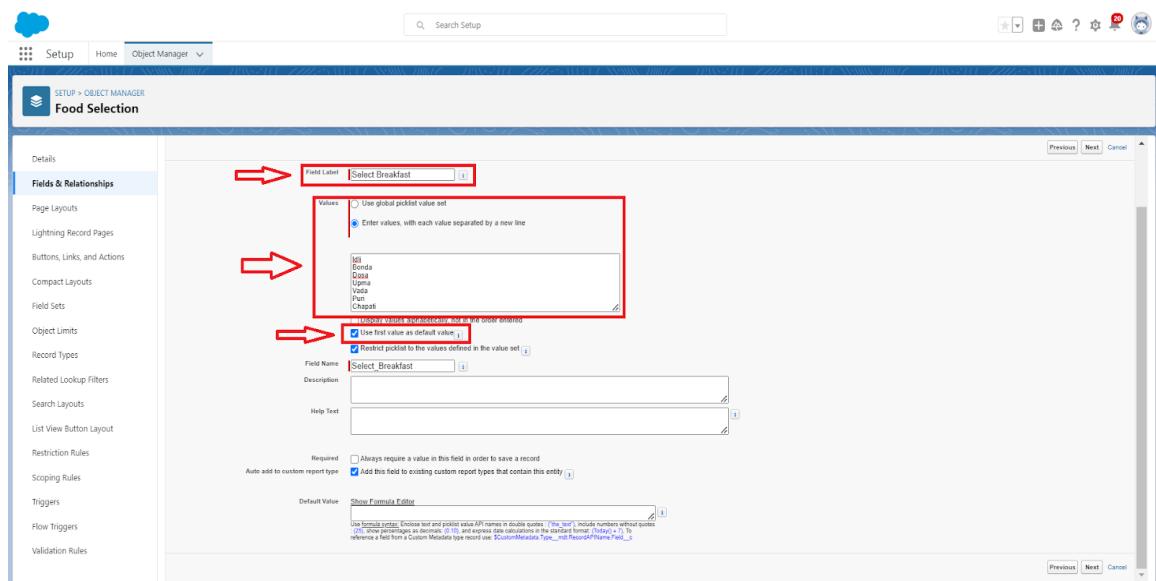
7.. Fill the Above as following:

- change the Field Label: Name
- Field Name : It's gets auto generate

- Click on Next > Next > Save and new.

3.Create a another picklist field for food selection object:

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



4. under the values enter the food list and then Select Checkbox Use First value as default Value and then next, next and save and new.

Field Dependency:

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

Need to use Field Dependency:

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

Picklist.

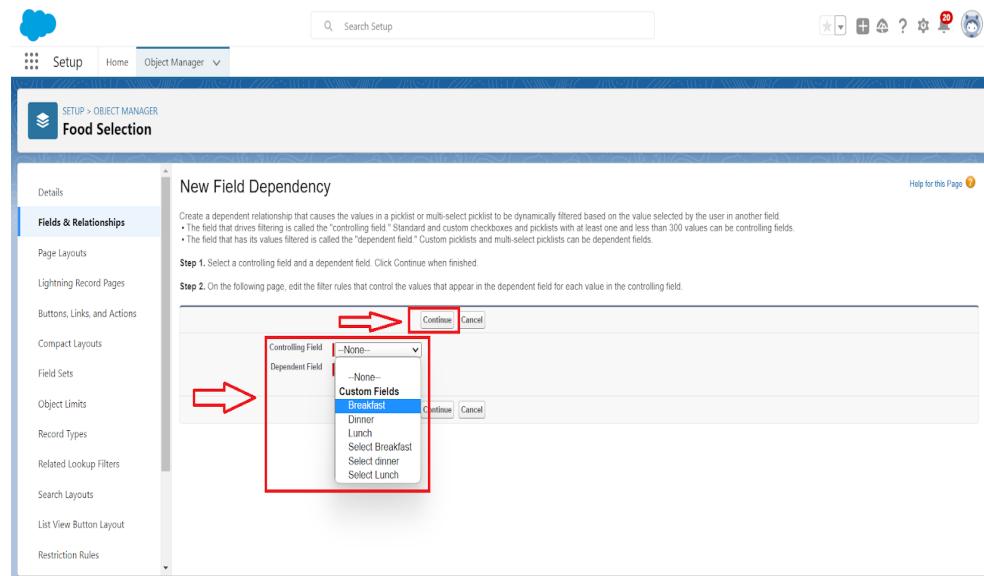
Create a Field Dependency on Breakfast and Select Breakfast Fields in Food Selection Object.

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

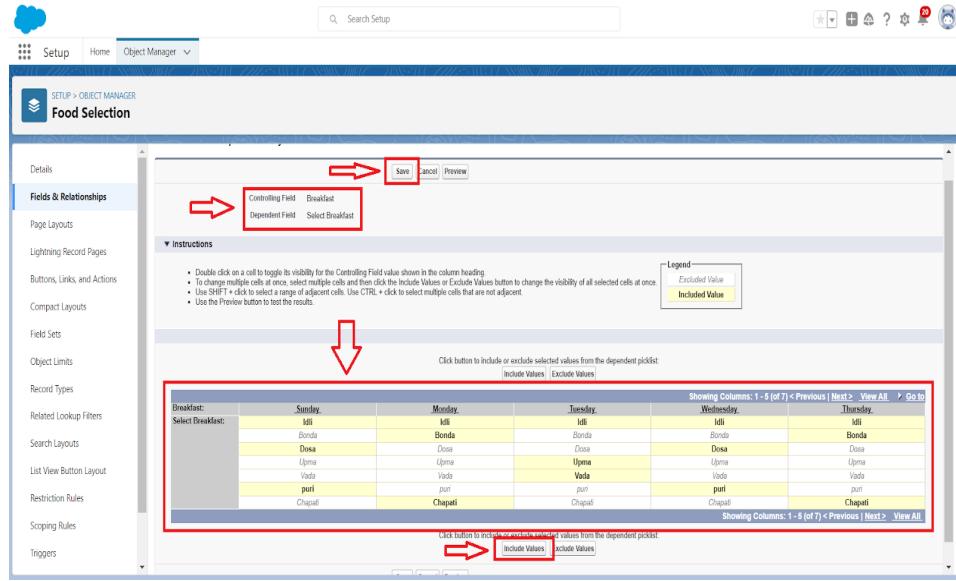
2.Now Click on fields & relationships and Click on Field Dependencies.

3.Now Click on New Option.

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



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



4. To create fields in an object:

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

5. To create fields in an object:

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

2. Now click on “Fields & Relationships” > New
 3. Select Data Type as a “Picklist”
 4. Fill the Above as following:
 - Field Label: Select Lunch
 - Under Value - Enter values, with each value separated by a new line
Meals, Chicken biryani, Veg biryani, Veg fried rice, Egg fried rice, Chicken fried rice, Curd rice, Tomato rice, Egg noodles, Chicken Noodles, Bhagara rice
 5. Select Checkbox Use First value as default Value
 6. Click on Next > Next > Save and new.
- 6. 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.

7. To create fields in an object:

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

2. Now click on “Fields & Relationships” > New
3. Select Data Type as a “Picklist”
4. Fill the Above as following:
 - Field Label: Dinner
 - Under Value - Select the Use global picklist value set
 - Under the drop down select the Custom Picklist Values
 - Select required
 - Click on Next > Next > Save and new.

8.. To create fields in an object:

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

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

9..To create a Field dependencies for Dinner and Select Dinner.

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

4.Creation of fields for the Feedback object

1. create fields & relationship to an object:

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

4. Click on next.
5. Click on the Related to drop down and Select the Customer1 object and click on Next
6. Fill these details as following:
7. Change the Field Label: Name
8. Field Name :It's gets auto generated
9. Click on Next > Next > Save and new.

Create another fields in the feedback tab like internet, Room Cleaning , Food and enter the values of their feeling like good,satisfied or bad and also create a suggestion field from the customers.

5.Creation of fields for the Total Rooms object:

1. To create fields in an object:

- 1.Go to setup > click on Object Manager > type object name(Total Rooms) in search bar > click on the object.
- 2.click on fields and relationships then new select datatype as formula with field lable Rooms available
3. Select the Formula Return Type as “Number”
- 4.Select the Decimal places as “0” and Click on Next.
5. Click on the Advanced Formula “ 30 - Rooms_Booked__c ” and Check Syntax and
- 6.Click on next and save.

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.

1. create a validation rule to an Room Booking Object:

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

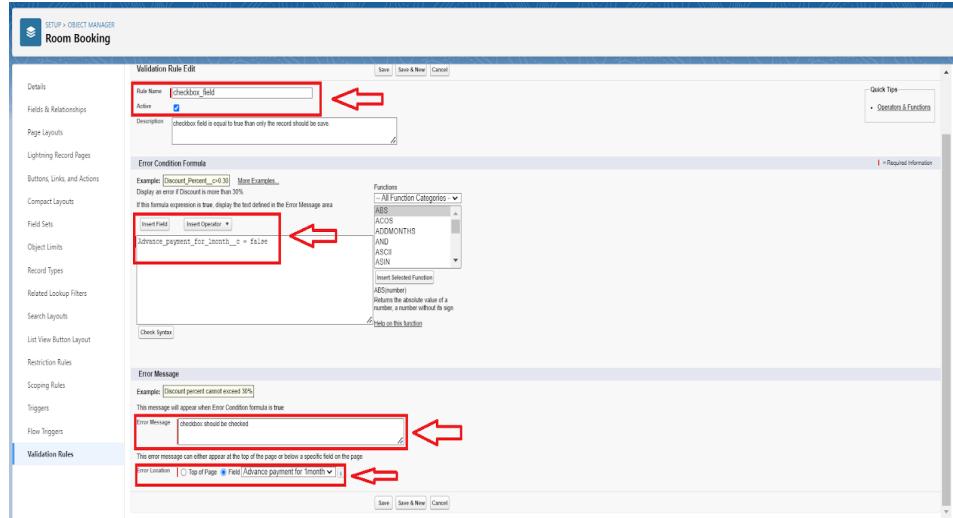
the search bar > click on the object.

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

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

4. Enter the formula in the formula Box “Advance_payment_for_1month_c = false” and check for syntax error.

5. Enter the error message “Checkbox should be checked”



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

7. Click on save.

2. Create another validation rule:

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

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

3. Enter Rule name “check in rule” and make the validation should be Active.

4. Enter the formula in the formula Box “Check_in_c = False” and check for syntax error.

5. Enter the error message “Check box should be checked”

6. Select error location as field(Check in) and click on save

3. Create another validation rule:

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

search bar > click on the object.

2. Now click on “Validation rule” at top > New.
3. Enter Rule name “check in rule” and make the validation should be Active.
4. Enter the formula in the formula Box “ Check_in__c = False ” and check for syntax error.
5. Enter the error message “Check box should be checked”
6. Select error location as field(Check in) and 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, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

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

We cannot delete standard ones

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

2. Custom Profiles:

1. Custom user Profile:

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

The screenshot shows the Salesforce Setup Profiles page. In the search bar at the top left, 'profile' is typed. Below the search bar, under the 'Users' section, there is a 'Profiles' link which is highlighted with a red arrow. The main area displays a table of profiles. One row for 'Standard User' is selected and highlighted with a red arrow. The table columns include Action, Profile Name, User License, and Custom.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Salesforce API Only, System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	<input type="checkbox"/>

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

The screenshot shows the Salesforce Clone Profile page. At the top, it says 'Clone Profile'. Below that, a message says 'Enter the name of the new profile.' A note below the message states 'You must select an existing profile to clone from.' The 'User License' is set to 'Salesforce'. The 'Profile Name' field contains 'Custom user', which is highlighted with a red arrow. At the bottom right, there is a 'Save' button, which is also highlighted with a red arrow.

3. While still on the profile page, then click Edit.

4. Scroll down to Custom Object Permissions and Give All access permissions for Customers, Feedbacks, Food selections, Payments, Room Bookings and Total Rooms.

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

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

5.Click on save.

2.Create platform user1:

To create a new profile:

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

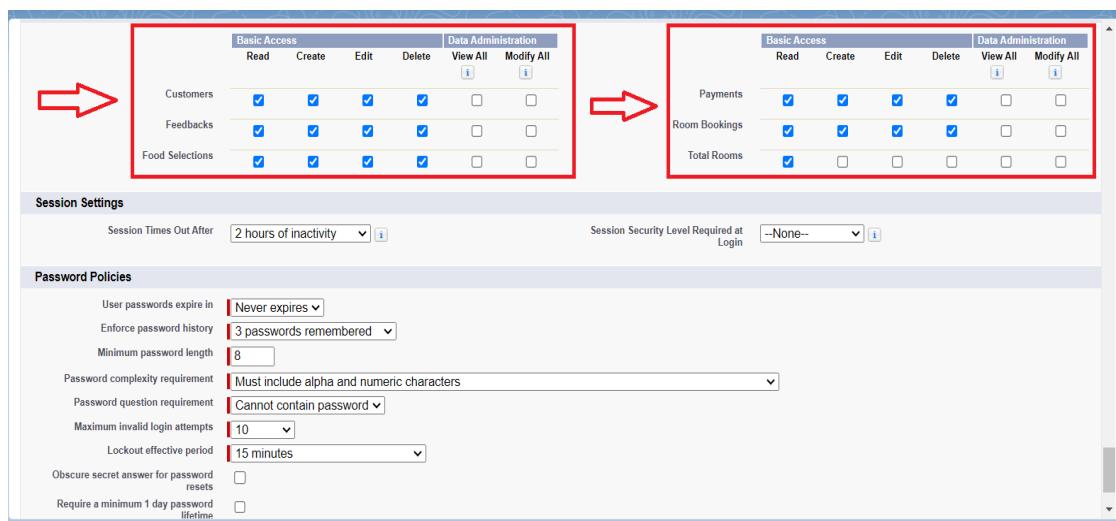
	Basic Access	Read	Create	Edit	Delete	View All	Modify All	Data Administration
Customers		<input checked="" type="checkbox"/>						
Feedbacks		<input checked="" type="checkbox"/>						
Food Selections		<input checked="" type="checkbox"/>						

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

5.Scroll down and click on save.

3.Create another platform user2:

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



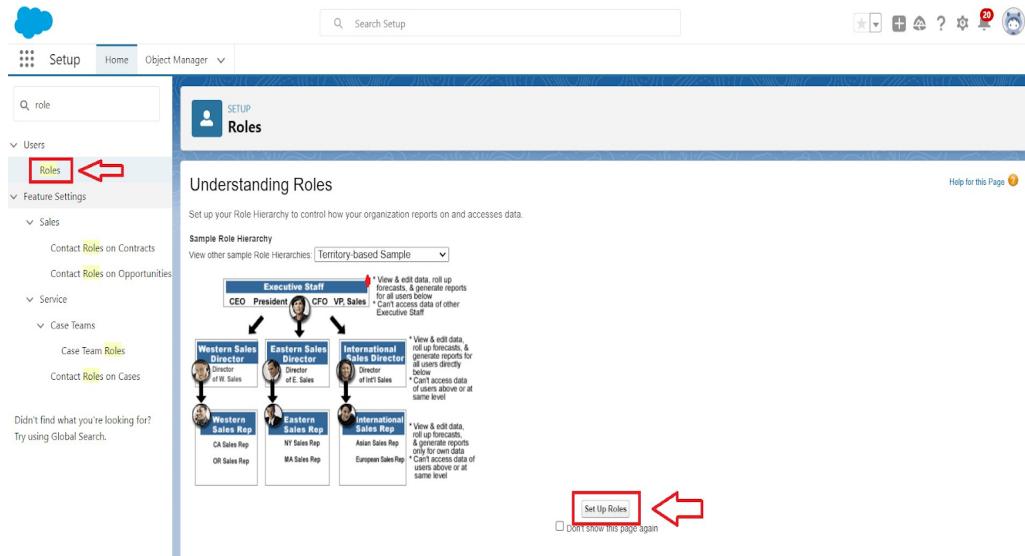
- 5.Scroll down and click on save.

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.

1. Marketing Role:

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



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



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

4. Then click on save.

2. Receptionist Role:

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

- 2.Click on Expand All and click on add role under CEO role.
- 3.Give Label as “Receptionist” and Role name gets auto populated.
- 4.Then click on save.

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.

1.Create a user:

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

2.Fill in the fields

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

3.Save

Then create two more users based on the details given.

User Adoption

1.Create a record:

- 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 new and fill the details and then save.

2.View a record:

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

3.Delete a record:

- 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 Arrow at right hand side on that Particular record.
- 5.Click delete and delete again.

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

1.Create a Report:

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

2.Create another report:

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

The screenshot shows the 'Reports' section of a software application. At the top, there's a navigation bar with tabs: 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, both highlighted with red boxes. On the left, there's a sidebar with categories: Reports, Recent (3 items), and REPORTS. Under REPORTS, there are sections for Recent, Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Three specific reports are listed:

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

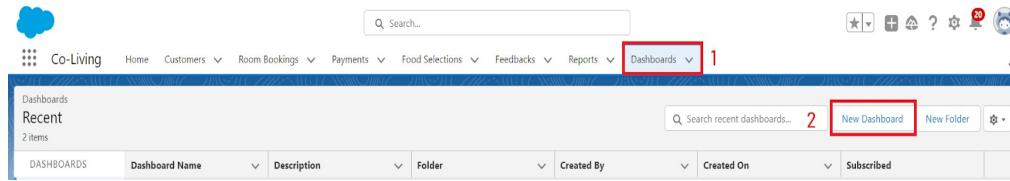
3. Select report type from category or from report type panel or from search panel. Select customer with Room booking with Payments ? click on start report.
4. Customize your report
5. Add fields from left pane as shown Above
6. Save or run it.

Dashboards:

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

1.Create a dashboard:

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



2.Give a Name and click on Create.

3.Select add component.

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

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

2.Create another dashboard:

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

2.Give a Name and click on Create.

3.Select add component.

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

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

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.

1.Create a Flow:

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

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

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

4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Decision Element”.



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

9. Enter the Outcome Details Label: Double sharing, Outcome API is generated
 - Resource: Select Record.Room sharing.

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

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

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

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

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

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

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

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

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

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

- Operator: Select Equals.
- Value: Select True.
- Click on Done.

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

15.Enter the update records details

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

16.Enter the update records details

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

17.Enter the update records details

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

- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 20000.
- Click on Done.

18.Enter the update records details

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

19.Enter the update records details

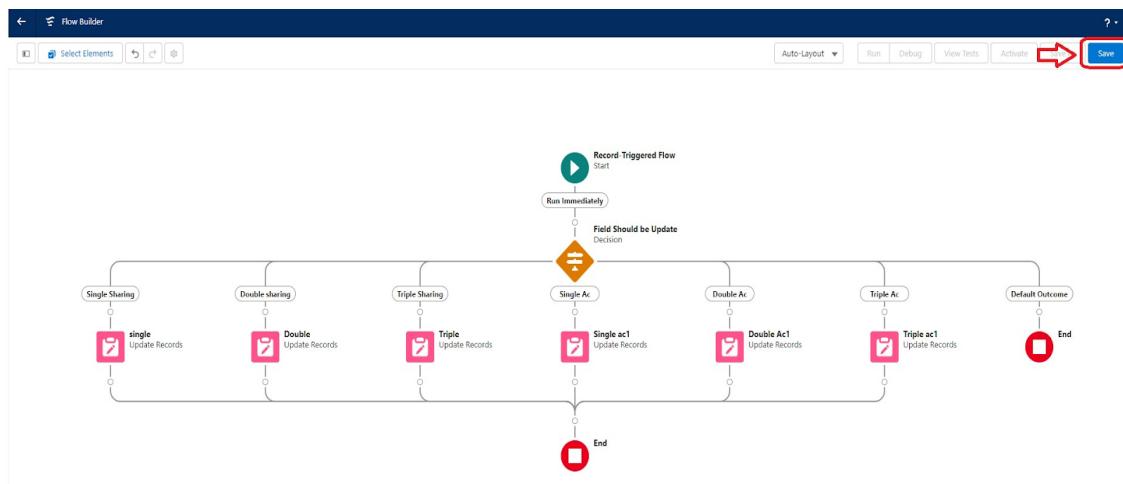
- Label: Double ac1.
- API name: Gets automatically Generated.
- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 30000.
- Click on Done.

20.Enter the update records details

- Label: Triple ac1.
- API name: Gets automatically Generated.

- Under the Set Field Values for the Room Booking Record.
- Field: Amount.
- Value: 26000.
- Click on Done.

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



2.Test the flow:

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

Save the flow

1

* Flow Label <input type="text" value="Update Amount Field"/>	* Flow API Name <input type="text" value="Update_Amount_Field"/>
Description <input type="text" value=""/>	
Show Advanced <input type="button" value="Cancel"/> <input style="background-color: #0070C0; color: white; border: none; padding: 2px 10px; border-radius: 5px;" type="button" value="Save"/>	

2

