

Cariño, Marcus Jeremy Mallari

AUF

Phase 4: Data Migration, Testing & Security

Milestone 21: Field History Tracking

The screenshot shows the Salesforce Field History Tracking setup page for the 'Booking' object. The left sidebar contains a navigation menu with options like 'Field Service Setup Home (Beta)', 'Feature Settings', 'Field History Tracking', 'Marketing', 'LinkedIn Lead Gen', 'Lead Gen Fields', 'Service', 'Field Service', 'Field Service Mobile', 'Field Service Mobile App Builder', 'Field Service Settings', 'Objects and Fields', 'Object Manager', 'Picklist Value Sets', 'Schema Builder', 'Process Automation', 'Workflow Actions', 'Field Updates', 'Security', and 'Field Accessibility'. The main content area has a search bar with 'booking' entered and a 'Show only tracked objects' checkbox. Below this is a table with columns 'Object' and 'Number of Tracked Fields'. The table lists 'Booking', 'Booking Payment', and 'BookingGuest'. The 'Booking' object is selected, and its settings are shown on the right. The 'Enable Booking History' checkbox is checked. Under 'Track old and new values', several fields are listed, including 'Owner', 'Booking Number', 'Customer', 'Guide_Assigned_c', 'TravelPackage', 'Customer Email', 'Travelling Start Date', 'Preferred Accommodation', 'Trip Type', 'Number of Travelers', 'Approval Status', 'Membership Chosen (Req)', 'Include Travel Insurance', 'Require Visa Assistance', 'Require Tour Guide', 'Preferred Guide Language', 'Booking Date', 'Booking Status' (checked), 'Cancellation Date', 'Cancel Confirmation', and 'Cancellation Reason'. The 'Cancel Confirmation' checkbox is also checked. The 'Save' button is visible at the bottom right.

multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.

Search Setup

Field

Field Service Setup Home (Beta)

Feature Settings

Field History Tracking

Marketing

LinkedIn Lead Gen

Lead Gen Fields

Service

Field Service

Field Service Mobile

Field Service Mobile App Builder

Field Service Settings

Objects and Fields

Object Manager

Picklist Value Sets

Schema Builder

Process Automation

Workflow Actions

Field Updates

Security

Field Accessibility

Didn't find what you're looking for? Try using Global Search.

Search Setup

booking

Show only tracked objects

Object	Number of Tracked Fields
Booking	View
Booking Payment	View
BookingGuest	View

View Tracked Fields

Page 1/1

Previous

Next

Booking

Enable Booking History

Deselect all fields

Track old and new values

- ☐ Owner
- ☐ Booking Number
- ☐ Customer
- ☐ Guide_Assigned_c
- ☐ TravelPackage
- ☐ Customer Email
- ☐ Travelling Start Date
- ☐ Preferred Accommodation
- ☐ Trip Type
- ☒ Number of Travelers
- ☐ Approval Status
- ☐ Membership Chosen (Req)
- ☐ Include Travel Insurance
- ☐ Require Visa Assistance
- ☐ Require Tour Guide
- ☐ Preferred Guide Language
- ☐ Booking Date
- ☒ Booking Status
- ☐ Cancellation Date
- ☒ Cancel Confirmation
- ☐ Cancellation Reason

Cancel

Save

The screenshot shows the Salesforce Field History Tracking setup page for the 'TravelPackage' object. The left sidebar contains a navigation menu with options like 'Field Service Setup Home (Beta)', 'Feature Settings', 'Field History Tracking', 'Marketing', 'LinkedIn Lead Gen', 'Lead Gen Fields', 'Service', 'Field Service', 'Field Service Mobile', 'Field Service Mobile App Builder', 'Field Service Settings', 'Objects and Fields', 'Object Manager', 'Picklist Value Sets', 'Schema Builder', 'Process Automation', 'Workflow Actions', 'Field Updates', 'Security', and 'Field Accessibility'. The main content area has a search bar with 'travel' entered and a 'Show only tracked objects' checkbox. Below this is a table with columns 'Object' and 'Number of Tracked Fields'. The table lists 'TravelPackage'. The 'TravelPackage' object is selected, and its settings are shown on the right. The 'Enable TravelPackage History' checkbox is checked. Under 'Track old and new values', several fields are listed, including 'Owner', 'TravelPackage Name', 'Price Per Person' (checked), 'Duration in Days', 'Country', 'Region', 'Places Covered', 'Meals Included', 'Visa Assistance', 'Insurance Included', 'Guide Included', 'Preferred Guide Language', 'Maximum Group Size', 'Additional Notes' (checked), 'Availability Status', and 'Average Rating'. The 'Additional Notes' checkbox is also checked. Under 'Track changes only', the following fields are listed: 'Package Type', 'Membership', 'Transportation Modes', and 'Guide Languages'. The 'Save' button is visible at the bottom right.

Search Setup

Field

Field Service Setup Home (Beta)

Feature Settings

Field History Tracking

Marketing

LinkedIn Lead Gen

Lead Gen Fields

Service

Field Service

Field Service Mobile

Field Service Mobile App Builder

Field Service Settings

Objects and Fields

Object Manager

Picklist Value Sets

Schema Builder

Process Automation

Workflow Actions

Field Updates

Security

Field Accessibility

Didn't find what you're looking for? Try using Global Search.

Search Setup

travel

Show only tracked objects

Object	Number of Tracked Fields
TravelPackage	View

View Tracked Fields

Page 1/1

Previous

Next

TravelPackage

Enable TravelPackage History

Deselect all fields

Track old and new values

- ☐ Owner
- ☐ TravelPackage Name
- ☒ Price Per Person
- ☐ Duration in Days
- ☐ Country
- ☐ Region
- ☐ Places Covered
- ☐ Meals Included
- ☐ Visa Assistance
- ☐ Insurance Included
- ☐ Guide Included
- ☐ Preferred Guide Language
- ☐ Maximum Group Size
- ☒ Additional Notes
- ☐ Availability Status
- ☐ Average Rating

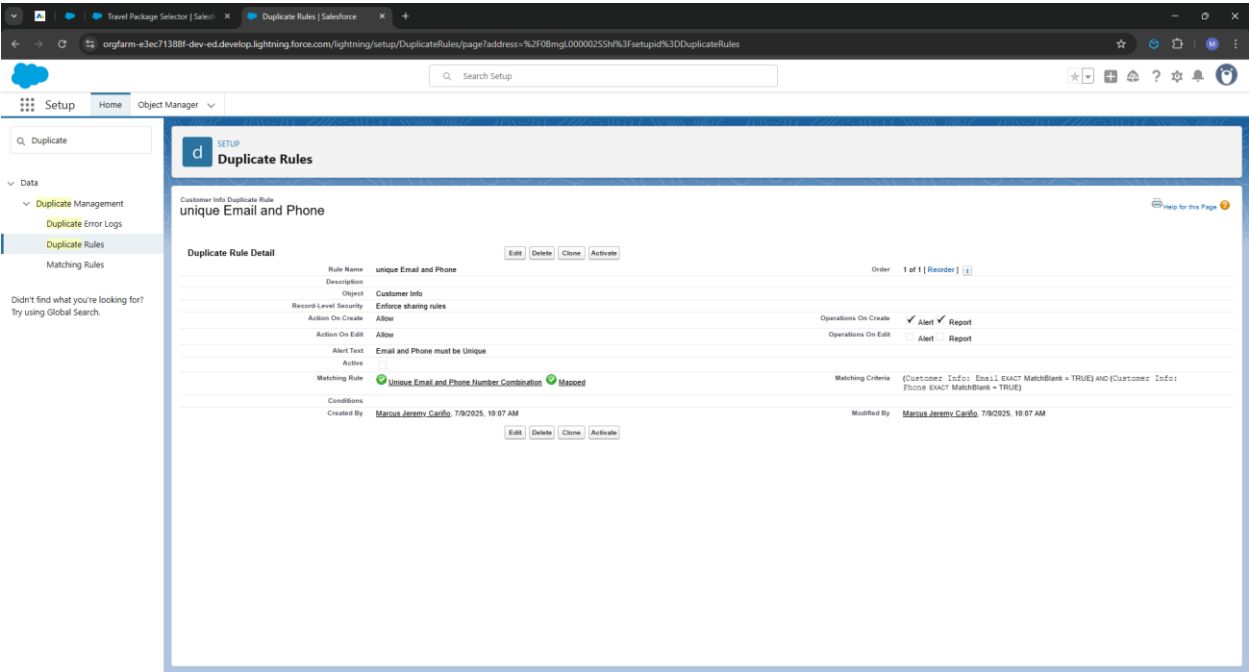
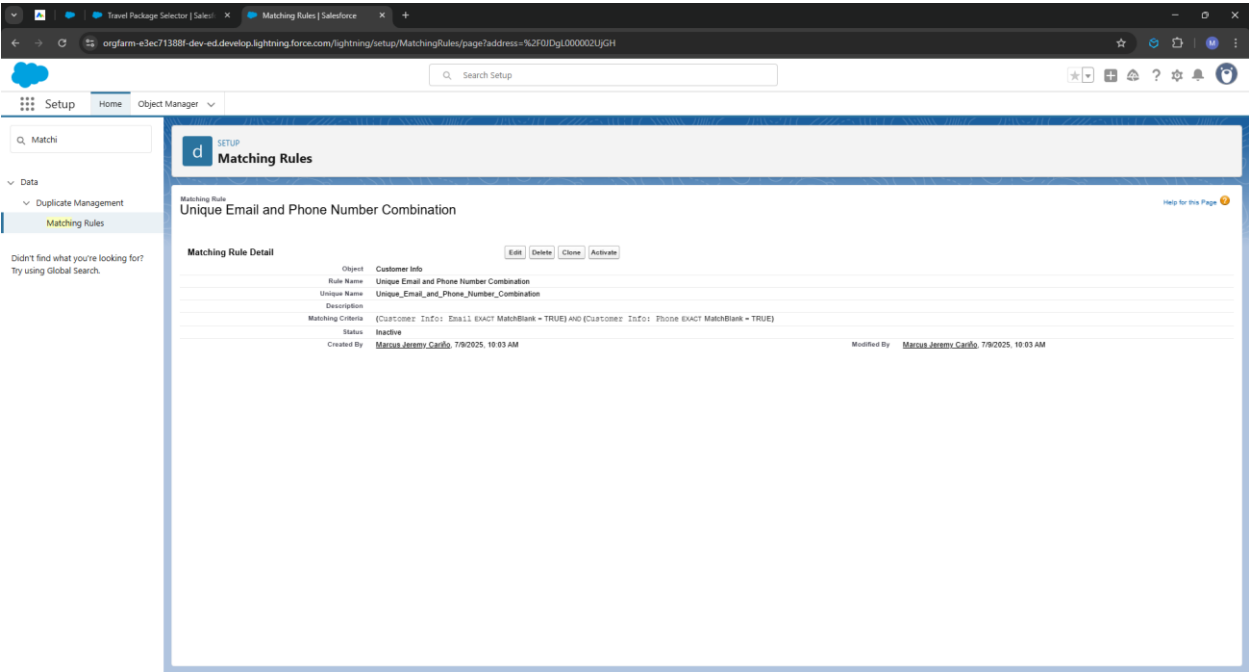
Track changes only

- ☐ Package Type
- ☐ Membership
- ☐ Transportation Modes
- ☐ Guide Languages

Cancel

Save

Milestone 22: Duplicate and Matching Rules



Milestone 23: Profiles

Setup

Home

Object Manager

Profiles

Users

Profiles

Didn't find what you're looking for?

Try using Global Search.

SETUP

Profiles

Communication Subscriptions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Channel Types	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communication Subscription Timings	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Addresses	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Individuals	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Labels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Locations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Party Consents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Push Topics	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sellers	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Custom Object Permissions

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
BookingGuests	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Booking Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers Info	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TravelPackages	<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: 90 days

Enforce password history: 3 passwords remembered

Milestone 24: Roles & Role Hierarchy

SKILL WALLET

- Dashboard
- Skill Bank
- Skill Wallet
- Skill Card
- Skill Credits

Tours & Travels Platform Development Using CRM-Salesforce

Overview | **Workspace** | Kanban

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.

Resources

Subtasks (3)

- Activity 1: Creation of Travel Agent Manager Role (Easy)
- Activity 2: Creating other Roles Under Travel Agent Manager Role (Easy)
- Activity 3: Creating other Three Roles Under CEO Role (Easy)

Progress Overview:

- Phase 2: Salesforce Development – Backend & Configurations (45%)
- Phase 3: UI/UX Development & Customization (0%)
- Phase 4: Data Migration, Testing & Security (0%)
- Phase 5: Deployment, Documentation & Maintenance (0%)

Milestones:

- Milestone 21: Field History Tracking
- Milestone 22 - Duplicate and Matching rules
- Milestone 23: Profiles
- Milestone 24: Roles & Role Hierarchy**
- Milestone 25: Permission Set
- Milestone 26: Sharing Setting
- Milestone 27 - Test Classes
- Milestone 28: Preparing Test Cases & Fixing Defects
- Milestone 29: Data Import Wizard

Setup | Home | Object Manager

Search Setup

Roles

Creating the Role Hierarchy

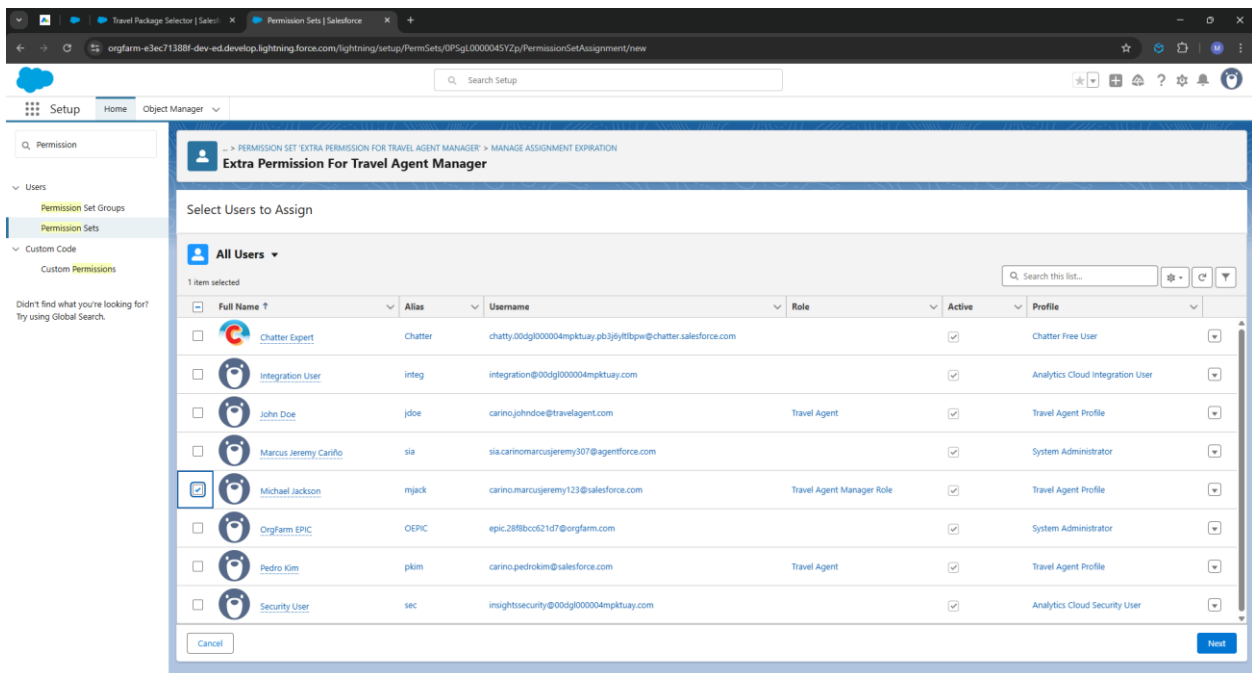
You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Collapsible All Expanded All

- Angela University Foundation
 - CEO
 - COO
 - Customer Service Rep Role
 - Finance Officer Role
 - Marketing Executive Role
 - SVP, Customer Service & Support
 - SVP, Human Resources
 - SVP, Sales & Marketing
 - Travel Agent Manager Role
 - Travel Agent
 - Travel Tour Guide

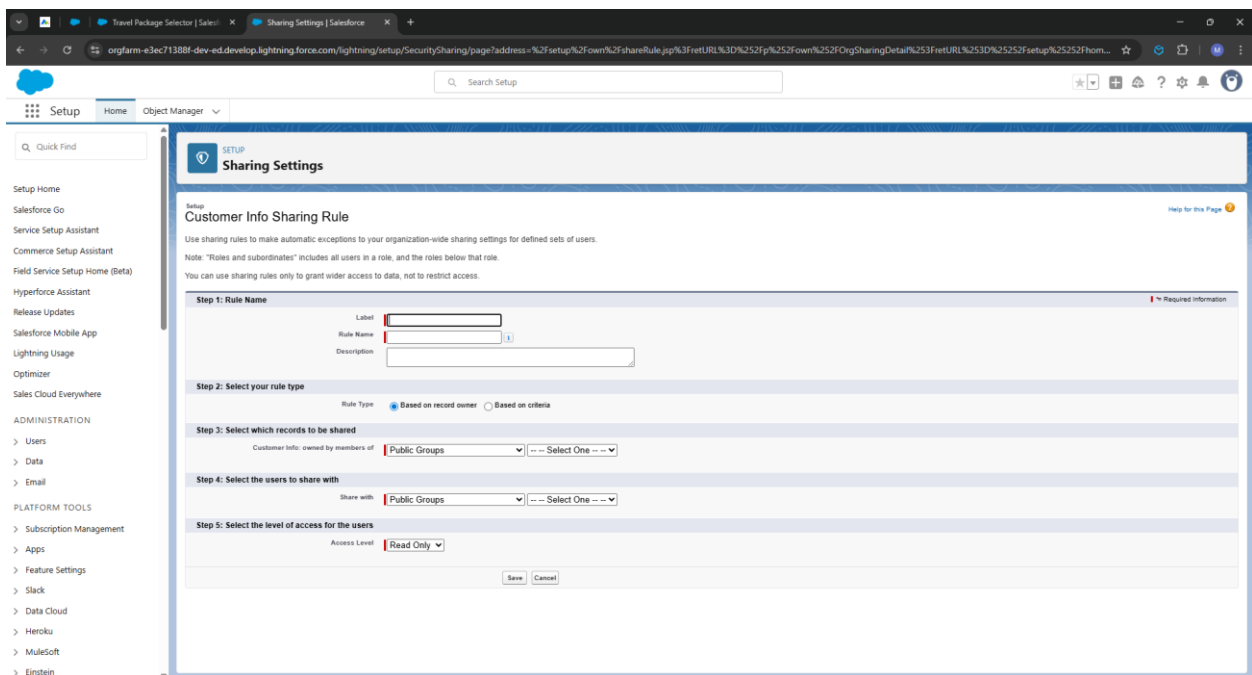
Milestone 25: Permission Set



The screenshot shows the Salesforce 'Extra Permission For Travel Agent Manager' page. The left sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. The main content area is titled 'Select Users to Assign' and displays a table of users. The table has columns for Full Name, Alias, Username, Role, Active, and Profile. The user 'Michael Jackson' is selected, indicated by a blue square in the selection column.

	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d000004mpkтуay.pb3jytltpw@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Integration User	integ	integration@00d000004mpkтуay.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	John Doe	jdoe	carino.johndoe@travelagent.com	Travel Agent	<input checked="" type="checkbox"/>	Travel Agent Profile
<input type="checkbox"/>	Marcus Jeremy Carifo	sia	sia.carinomarcusjeremy307@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input checked="" type="checkbox"/>	Michael Jackson	mjack	carino.marcusjeremy123@salesforce.com	Travel Agent Manager Role	<input checked="" type="checkbox"/>	Travel Agent Profile
<input type="checkbox"/>	Orgfarm EPIC	OEPI	epic.28f8b6c621d7@orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Pedro Kim	pkim	carino.pedrokim@salesforce.com	Travel Agent	<input checked="" type="checkbox"/>	Travel Agent Profile
<input type="checkbox"/>	Security User	sec	insightsecurity@00d000004mpkтуay.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone 26: Sharing Setting



The screenshot shows the Salesforce 'Sharing Settings' page for a 'Customer Info Sharing Rule'. The page is divided into five steps: Step 1: Rule Name, Step 2: Select your rule type, Step 3: Select which records to be shared, Step 4: Select the users to share with, and Step 5: Select the level of access for the users. The 'Rule Type' is set to 'Based on record owner'. The 'Customer Info' is owned by members of 'Public Groups'. The 'Share with' is set to 'Public Groups'. The 'Access Level' is set to 'Read Only'.

Step 1: Rule Name

Label:
Rule Name:
Description:

Step 2: Select your rule type

Rule Type: ☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

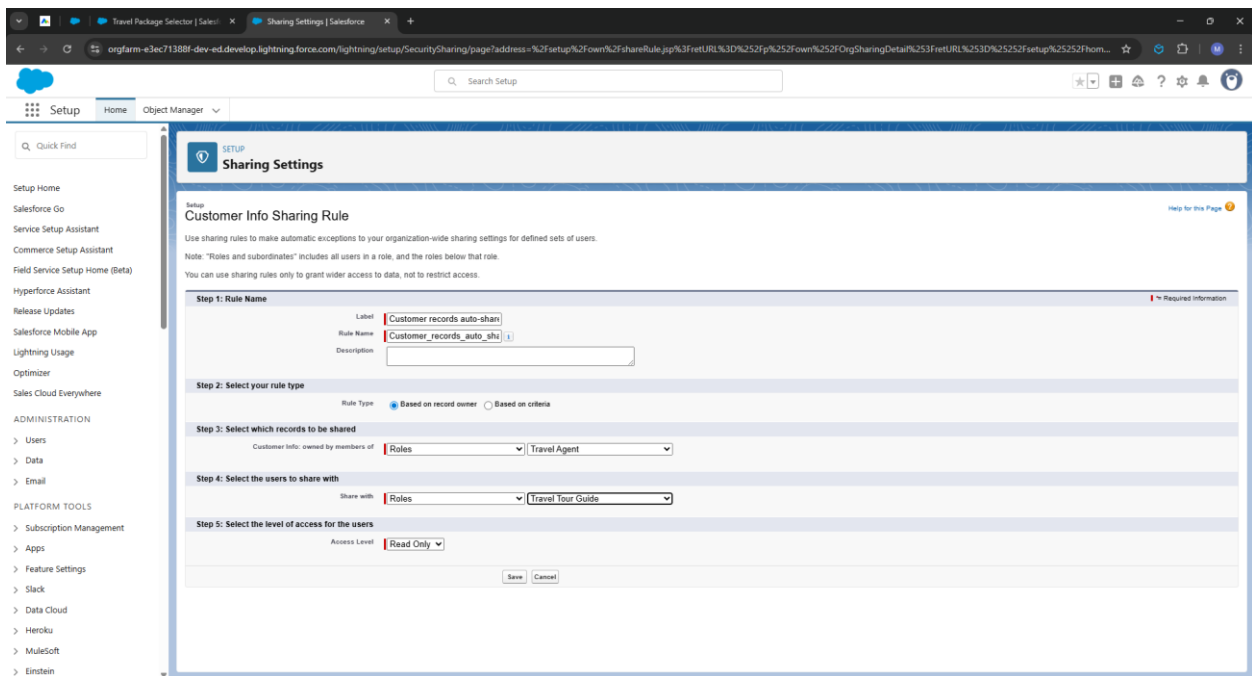
Customer Info: owned by members of -- Select One --

Step 4: Select the users to share with

Share with: -- Select One --

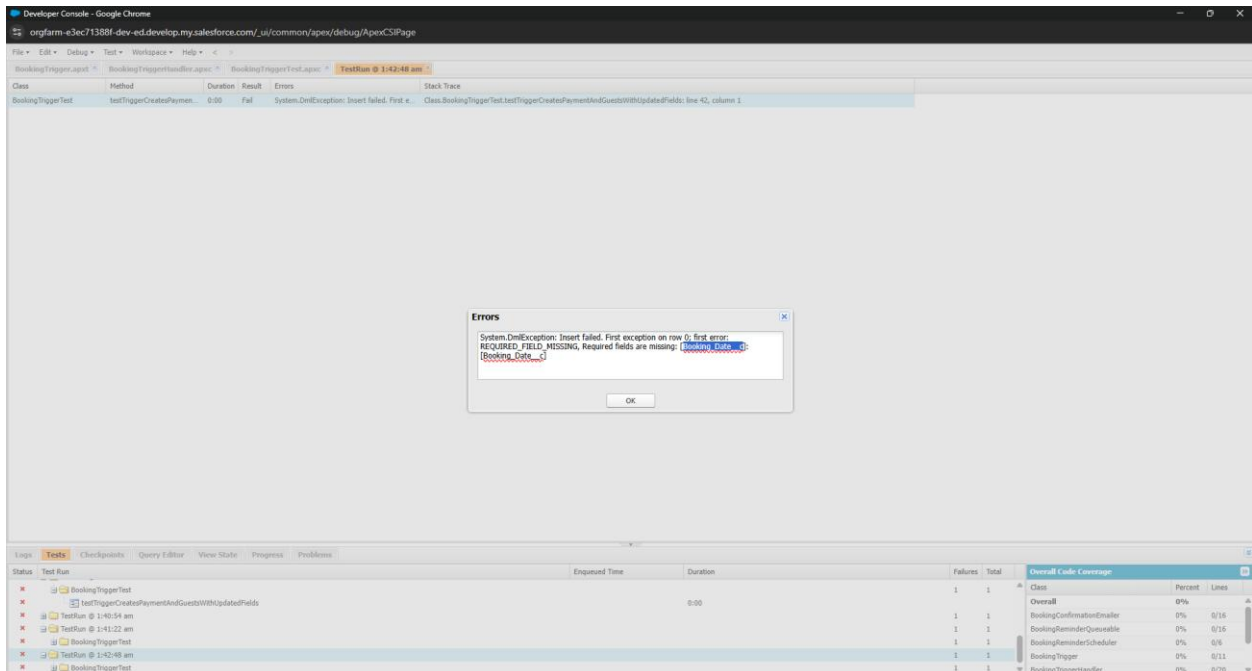
Step 5: Select the level of access for the users

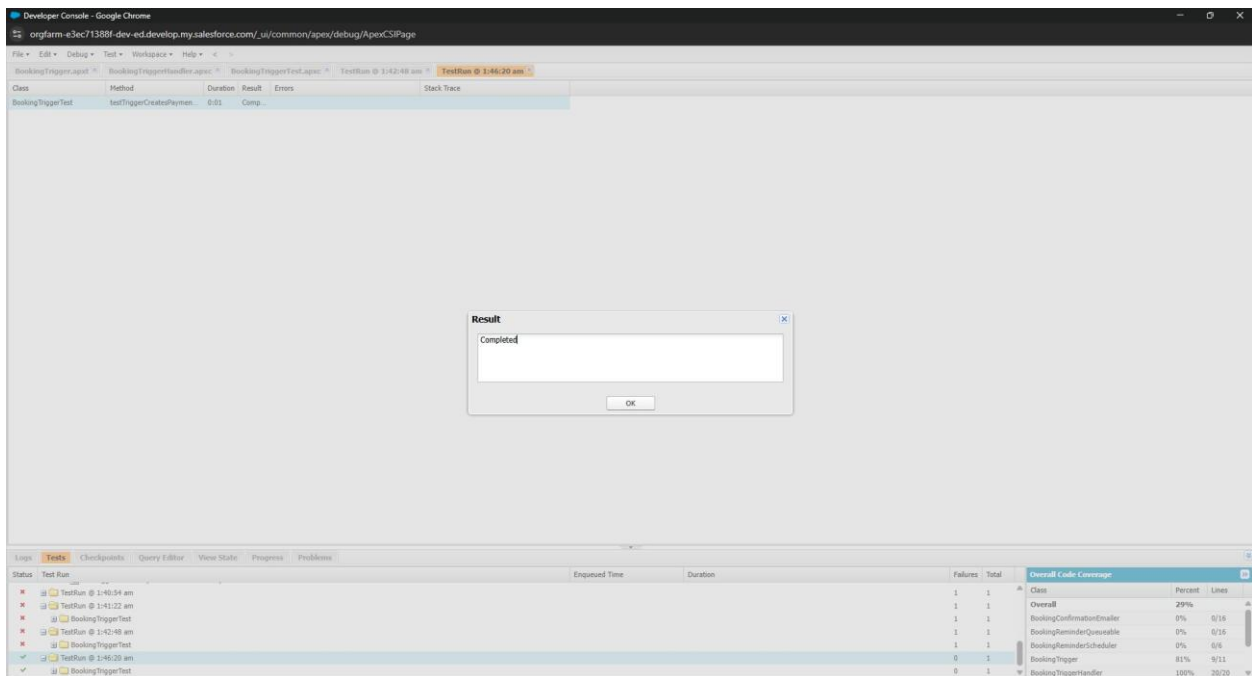
Access Level:



Milestone 27: Test Classes

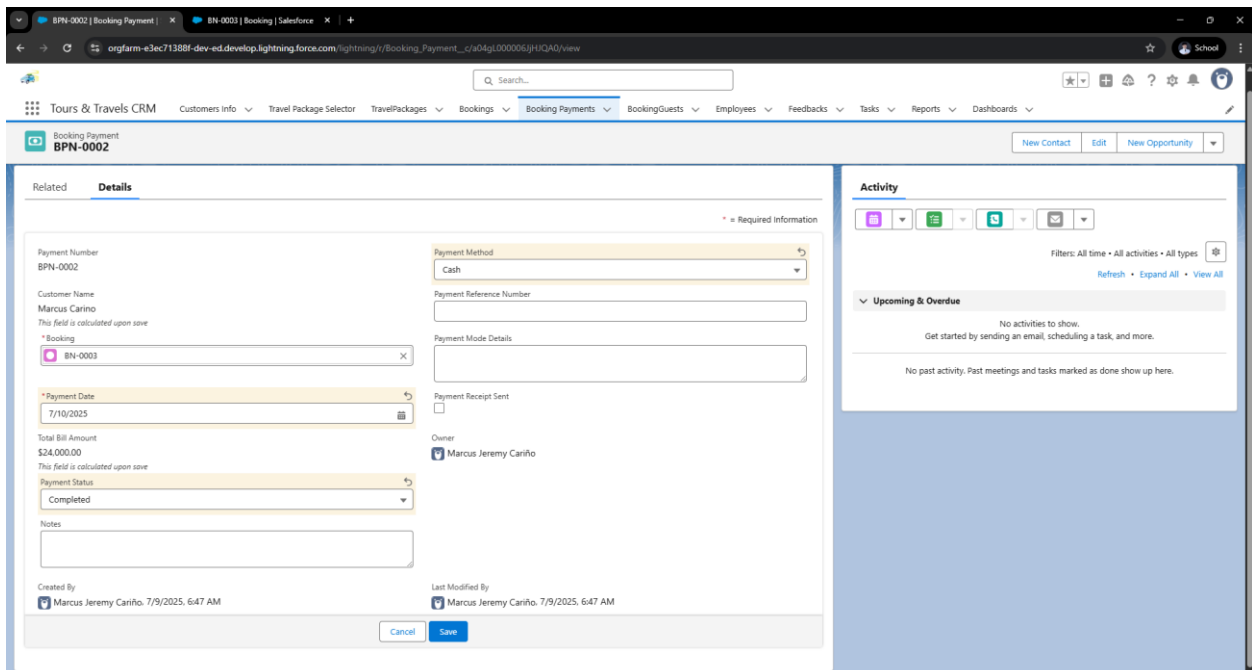
Cleanup test classes missing fields

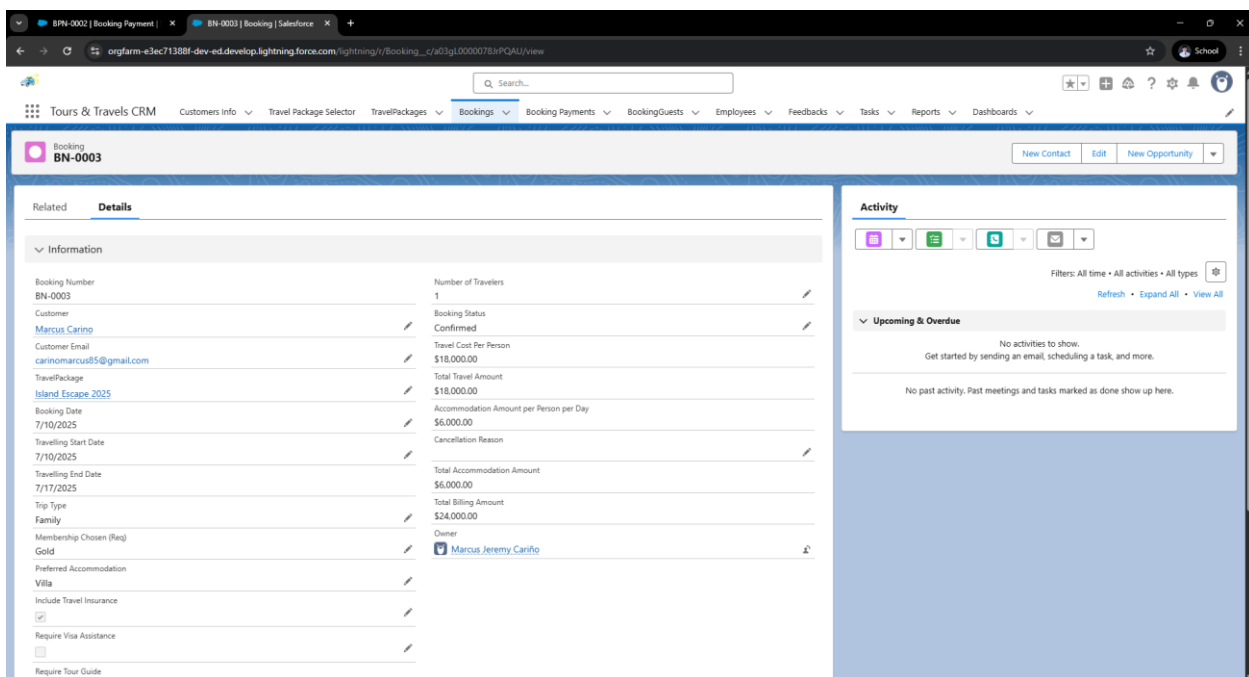
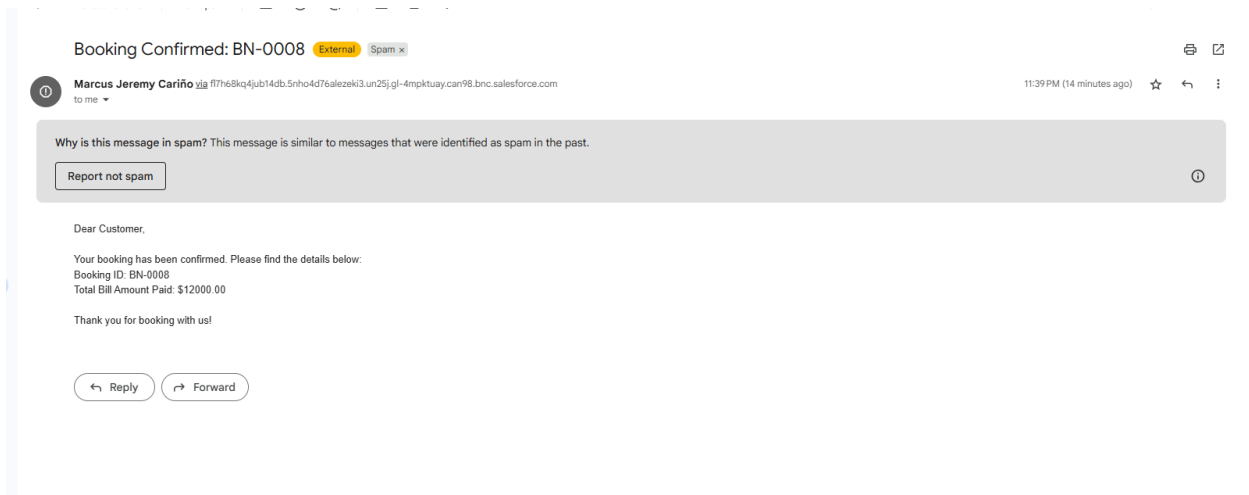




Milestone 28: Preparing Test Cases & Fixing Defects

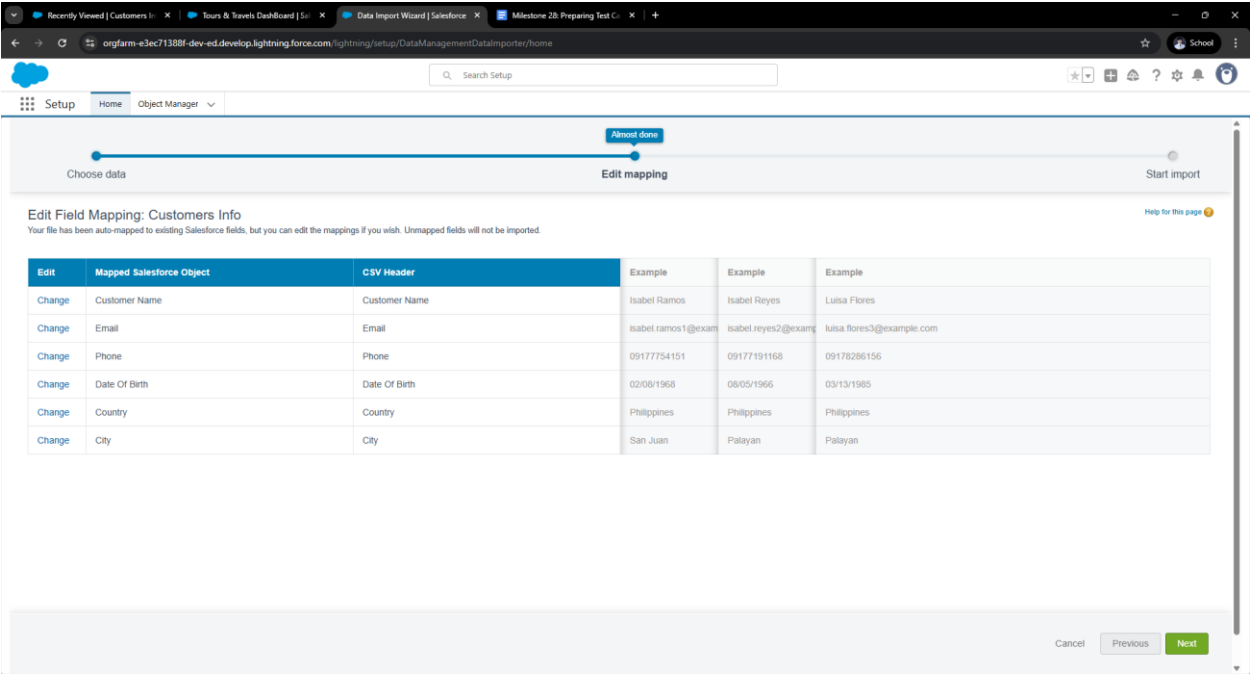
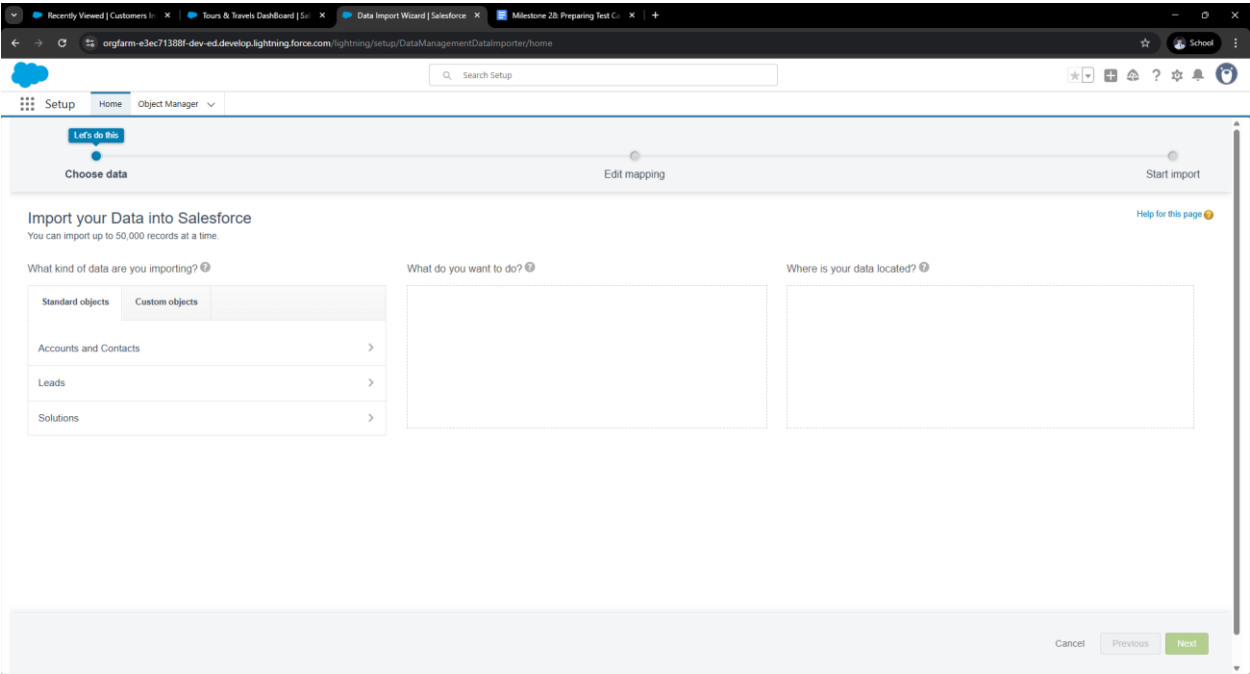
Activity 3: Verify whether the Booking Status is Confirmed in Booking Object when Payment Status field is updated to completed in Booking Payment Object. And also verify whether the customer received the mail regarding Booking confirmation and payment completed.





Test Case Successful

Milestone 29: Data Import Wizard



The screenshot displays the Salesforce Lightning interface for the 'Customers Info' section. The 'Recently Viewed' list is active, showing a table of customer records. The table has columns for 'Customer Name' and 'Recently Viewed'. The first row is highlighted, showing 'Miguel Reyes'. The interface includes a search bar, navigation tabs, and a sidebar with various Salesforce icons.

	Customer Name	Recently Viewed
7	Miguel Reyes	
8	Luisa Martinez	
9	Jose Martinez	
10	Miguel Lopez	
11	Juan Reyes	
12	Isabel Gonzales	
13	Jose Lopez	
14	Pedro Reyes	
15	Rosa Garcia	
16	Luisa Lopez	
17	Juan Flores	
18	Pedro Torres	
19	Juan Garcia	
20	Isabel Lopez	
21	Ana Reyes	
22	Test Customer	
23	Test Customer 2	
24	Jeremy	
25	Mira Lopez	
26	Carlos Dela Rosa	
27	Lea Santos	
28	Anna Reyes	

[illegible]

Travel Packages

Setup

Home

Object Manager

Q Data import

Integrations

Data Import Wizard

Didn't find what you're looking for?

Try using Global Search.

SETUP

Bulk Data Load Jobs

Bulk Data Load Job

750gL0000080QcD

View the details of a bulk data load job.

Back to List: Bulk Data Load Jobs

Bulk Data Load Job Detail

Job ID: 750gL0000080QcD

Submitted By: Maria, Jeremy, Carlos

Start Time: 7/10/2025, 11:43 AM PST

End Time: 7/10/2025, 11:43 AM PST

Time to Complete (hh:mm:ss): 00:01

Object: TravelPackage

External ID Field:

Content Type: CSV

Concurrency Mode: Parallel

API Version: 64.0

Job Type: Bulk V1

Operation: Insert

Queued Batches: 0

In Progress Batches: 0

Completed Batches: 1

Failed Batches: 0

Progress: 100%

Records Processed: 20

Records Failed: 0

Retries: 0

Status: Closed

Total Processing Time (ms): 158

API Action Processing Time (ms): 67

Apex Processing Time (ms): 0

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Active Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gL000006PA3y	7/10/2025, 11:43 AM	7/10/2025, 11:43 AM	158	67	0	20	0	0		Completed

Tours & Travels CRM

Customers Info

Travel Package Selector

TravelPackages

Bookings

Booking Payments

BookingGuests

Employees

Feedbacks

Tasks

Reports

Dashboards

TravelPackages

All

New

Import

Change Owner

Printable View

Assign Label

Search this list...

25 items • Sorted by TravelPackage Name • Updated a few seconds ago

<input type="checkbox"/>	TravelPackage Name ↑	
3	Northern Highlands Adventure	
4	Package 1	
5	Package 10	
6	Package 11	
7	Package 12	
8	Package 13	
9	Package 14	
10	Package 15	
11	Package 16	
12	Package 17	
13	Package 18	
14	Package 19	
15	Package 2	
16	Package 20	
17	Package 3	
18	Package 4	
19	Package 5	
20	Package 6	
21	Package 7	
22	Package 8	
23	Package 9	
24	Palawan Island Cruise	
25	Tropical Trio Delight	

Employees

Setup | Home | Object Manager

Search Setup

Data import

Integrations

Data Import Wizard

Didn't find what you're looking for? Try using Global Search.

SETUP Bulk Data Load Jobs

Bulk Data Load Job
750gL0000080SsX

View the details of a bulk data load job.

[Back to List of Bulk Data Load Jobs](#)

Bulk Data Load Job Detail

[Reload](#)

Job ID	750gL0000080SsX	Job Type	Bulk V1	Status	Closed
Submitted By	Marisa, Jeremy, Carlos	Operation	Insert	Total Processing Time (ms)	122
Start Time	7/10/2025, 11:51 AM PST	Queued Batches	0	API Action Processing Time (ms)	77
End Time	7/10/2025, 11:51 AM PST	In Progress Batches	0	Apex Processing Time (ms)	1
Time to Complete (hh:mm:ss)	00:01	Completed Batches	1	Failed Batches	0
Object	Employee	Progress	100%	Records Processed	20
External ID Field		Records Failed	0	Records Failed	0
Content Type	CSV	Retries	0	Retry Count	0
Concurrency Mode	Parallel			State Message	Completed
API Version	64.0				

[Reload](#)

Batches

View Request	View Result	Batch ID	Start Time	End Time	Total Processing Time (ms)	API Action Processing Time (ms)	Apex Processing Time (ms)	Records Processed	Records Failed	Retry Count	State Message	Status
View Request	View Result	751gL000004PEyn	7/10/2025, 11:51 AM	7/10/2025, 11:51 AM	122	77	1	20	0	0	Completed	Completed

Tours & Travels CRM | Customers Info | Travel Package Selector | Travel Packages | Bookings | Booking Payments | BookingGuests | Employees | Feedbacks | Tasks | Reports | Dashboards

Search...

Employees

All was pinned.

New | Import | Change Owner | Printable View | Assign Label

Search this list...

26 items • Sorted by Employee ID • Updated a few seconds ago

Employee ID	
4	E-0004
5	E-0005
6	E-0006
7	E-0007
8	E-0008
9	E-0009
10	E-0010
11	E-0011
12	E-0012
13	E-0013
14	E-0014
15	E-0015
16	E-0016
17	E-0017
18	E-0018
19	E-0019
20	E-0020
21	E-0021
22	E-0022
23	E-0023
24	E-0024
25	E-0025
26	E-0026

