

Phase 2: Salesforce Org Setup & Configuration

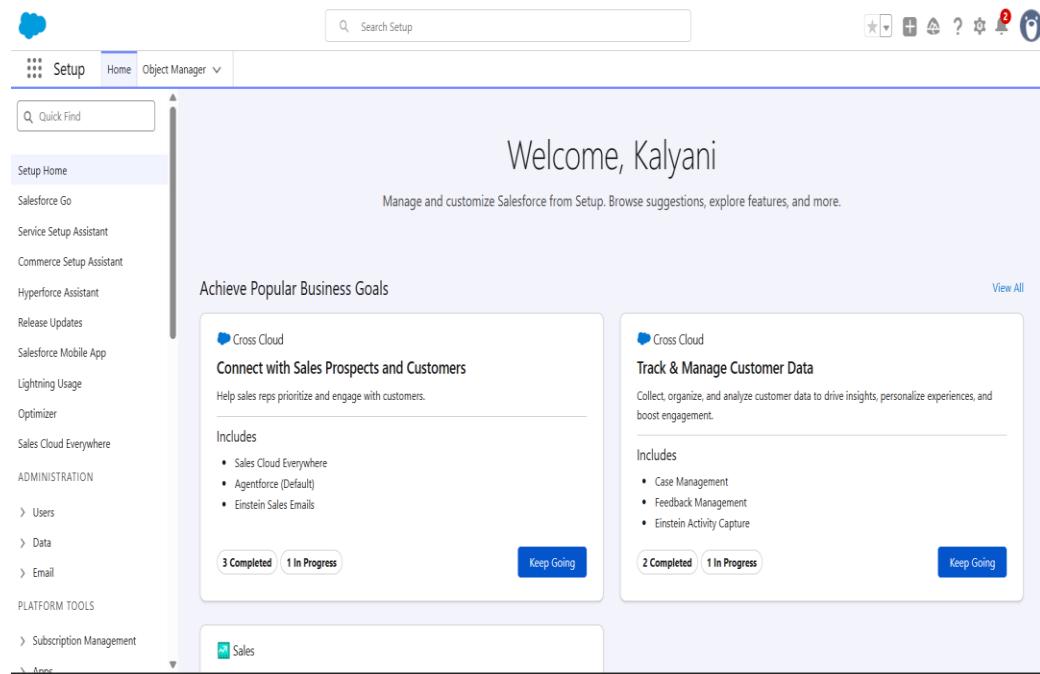
1. Objective

Phase 2 focuses on setting up the Salesforce Organization, configuring objects, fields, page layouts, and automations required for the Visitor Management CRM system. This phase ensures that the system is ready for testing and further automation.

2. Salesforce Setup

2.1 Login & Setup

1. Login to your Salesforce Developer account.
2. Navigate to **Setup** by clicking the gear icon.



2. Custom Object Creation

2.1 Create Visitor Object

- **Navigate:** Setup → Object Manager → Create → Custom Object
- **Fill details:**
 - Label: Visitor

- Plural Label: Visitors
- Record Name: Visitor ID (Auto Number)
- Check Allow Reports, Allow Activities

2.2 Add Custom Fields

For **Visitor object**, create the following fields:

Field Name	Data Type	Description / Notes
Phone Number	Text	Visitor contact number
Email	Email	Visitor email
ID Proof Type	Picklist	E.g., Aadhar, Passport, Driving License
ID Proof Number	Text	Number of selected ID Proof
Purpose of Visit	Text	Reason for visit
Check-In Time	Date/Time	Automatically recorded or manual
Check-Out Time	Date/Time	Recorded at visitor exit
Host	Lookup(User)	Assigned host user

- Set Field-Level Security: Make all fields visible for all profiles.
- Add fields to Page Layout.
- Screenshot Placeholder: Field creation & Field-Level Security page

Fields & Relationships					
FIELD LABEL		FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Check-In Time		Check_In_Time__c	Date/Time		
Check-Out Time		Check_Out_Time__c	Date/Time		
Created By		CreatedById	Lookup(User)		
Email		Email__c	Email		
Host		Host__c	Lookup(host)		
ID Proof Number		ID_Proof_Number__c	Text(20)		
ID Proof Type		ID_Proof_Type__c	Picklist		
Last Modified By		LastModifiedById	Lookup(User)		
Owner		OwnerId	Lookup(User,Group)		
Phone Number		Phone_Number__c	Phone		
Purpose of Visit		Purpose_of_Visit__c	Text Area(255)		
Record Type		RecordTypeId	Record Type		

3. Page Layout & Record Type

- Create Record Type (if required), e.g., Scheduled Visitor.
- Assign Page Layouts to profiles.

4. Automation

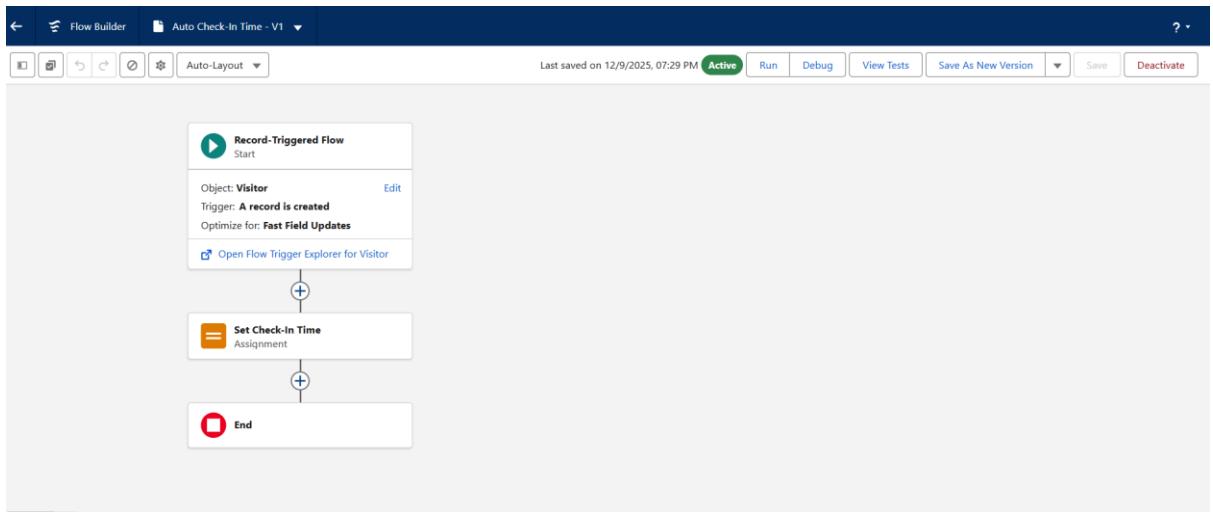
- Create Flow or Assignment Rules:

Example: Automatically assign Check-In Time when a visitor record is created.

- Steps:

1.Create a Flow → Record-Triggered Flow

2.Add Assignment element → Set \$Record.Check_In_Time__c = \$Flow.CurrentDateTime



6. Testing

- Create a sample visitor record to verify:
 - Fields are working correctly
 - Check-In Time is automatically assigned
 - Page layouts display correctly