

Phase 2: Salesforce Org Setup & Configuration

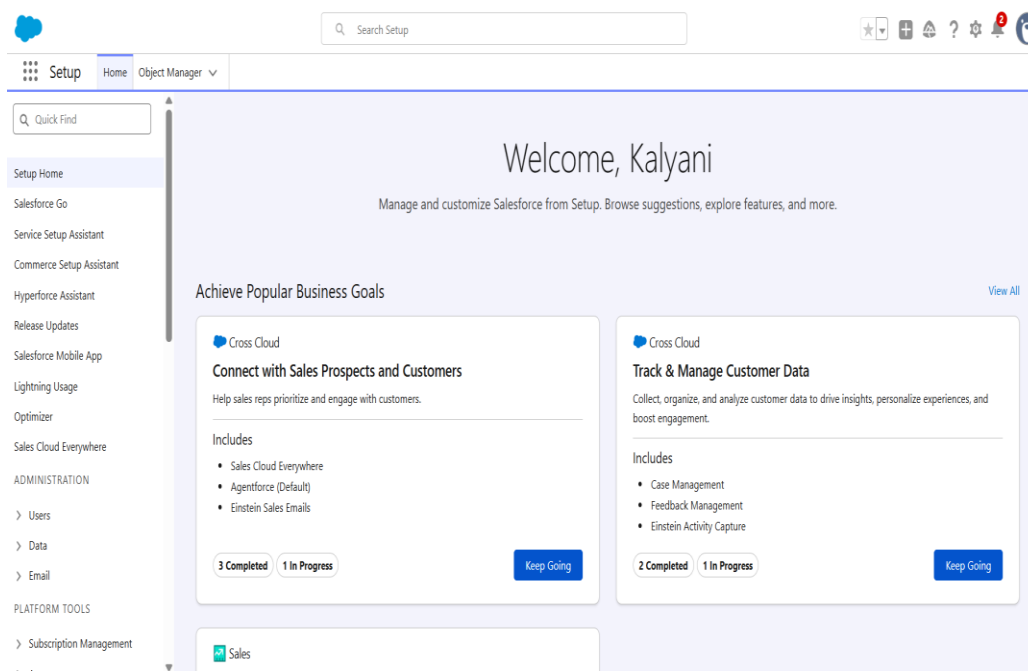
1. Objective

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

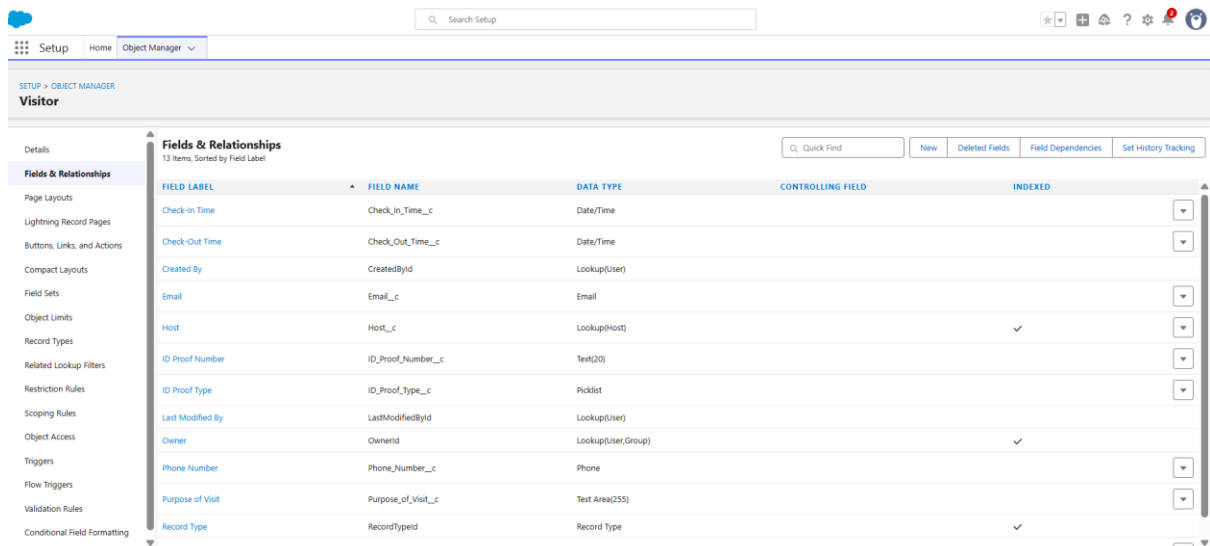
- Plural Label: Visitors
- Record Name: Visitor ID (Auto Number)
- Check Allow Reports, Allow Activities

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



The screenshot shows the Salesforce Setup interface for the 'Visitor' object. The 'Fields & Relationships' tab is selected, displaying a table of 13 fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Check-In Time, Check-Out Time, Created By, Email, Host, ID Proof Number, ID Proof Type, Last Modified By, Owner, Phone Number, Purpose of Visit, and Record Type. The 'Record Type' field is highlighted in blue.

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

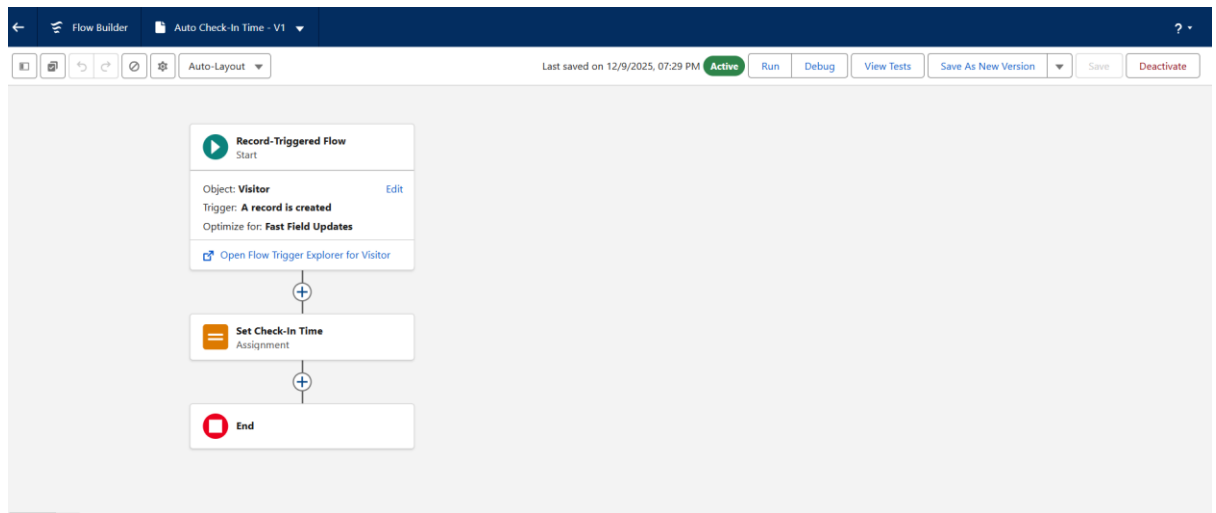
- Create Flow or Assignment Rules:

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