



**ANGELES UNIVERSITY FOUNDATION**  
*Angeles City*

**College of Computer Studies**  
Center of Excellence in IT Education  
**Salesforce Capstone**

Student Name: Kim Lois Sangil  
Course: Information Technology

## **Tours & Travels Platform Development Using CRM-Salesforce**

### **Project Overview**

This project aims to develop a CRM catering to the Tours and Travels company by using Salesforce's long-list of world-class tools and my capabilities as a student who has gone through SmartBridge's internship program. Providing solutions that include automated booking confirmations, cancellation approval processes, customer tracking, and guided travel packages

### **Objectives**

The primary objective of the Travels and Tours project is to create an efficient and scalable CRM to manage end to end customer relations, from customers' initial inquiry up to the final payment. The system was designed to improve customer data organization, automate booking processes, and automate follow-ups such as payment confirmations and booking cancellations. Also digitalizing manual tasks like guest tracking, approvals, and booking validations.

## **Phase 1: Requirements Analysis & Planning**

### **Understanding Business Requirements:**

The client needed a centralized platform that enables them to manage customer information, efficiently manage travel bookings, track payments and for the system to support internal workflows such as approvals and guest management. The manual processes previously were prone to errors and lacked real-time visibility. The CRM solution was formulated to be able to solve issues such as duplicated customer data, delayed booking approvals, unstructured follow-ups,

and inconsistent communication between employees-to-employees as well as employees-to-customer relations.

### **Defining Project Scope and Objectives:**

- Develop a Salesforce-based CRM tailor-fitted to the Tours and Travels operations.
- Centralize customer records that include validation and prevent duplicates.
- Automate booking payment tracking and confirmation workflows.
- Enable booking cancellations through an approval process.
- Establish role-based data access for travel agents, managers and admins.
- Provide reporting tools for sales and operational insights.

### **Designing Data Model and Security Model:**

- **Objects Created:** Customer Info, Travel Package, Booking, Booking Guest, Booking Payment, Employee
- **Relationships:** Lookup relationships between Booking and Customer Info, Travel Package, and Employees.
- **Security:** Role hierarchy and profiles are established. Field-level security ensures sensitive data such as emails, and payment details are only visible to applicable users.

### **Creating Project Roadmap & Milestones:**

- Phases are broken down into deliverables such as creating objects, validation rules, automation by creating flows/triggers, page layouts, testing and data import.
- Follow milestones set indicated in each phase.
- Utilize Skillwallet's provided 'Workspace' and 'Kanban' features.

## Phase 2: Salesforce Development –Backend & Configurations

### Milestone 1: Salesforce Account

#### Activity 1: Creating Developer Account

 salesforce

## Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud.

Sign up for your Developer Edition.

- ✓ Build apps fast with drag-and-drop tools
- ✓ Go further with Apex code
- ✓ Build AI agents with Agentforce
- ✓ Harmonize your data with Data Cloud
- ✓ Ground Agentforce with structured and unstructured data
- ✓ Integrate with anything using APIs



**Sign up for your Developer Edition**

A free Salesforce Platform environment with Agentforce and Data Cloud

First name  Last name

Job title  Work email

Company  Country/Region

State/Province

Your org may be provisioned on or migrated to Hyperforce, Salesforce's public cloud Infrastructure.

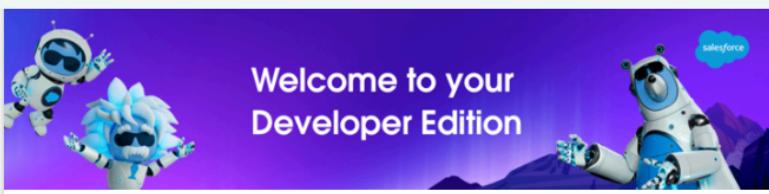
I agree to the [Main Services Agreement – Developer Services](#) and [Salesforce Program Agreement](#). I acknowledge, as described in the Developer Documentation: (1) the Developer Edition includes autonomous and other generative AI features; and (2) Salesforce may limit use of those features and the org, and may terminate any org that has been inactive for 45 days.

We value your privacy. To learn more, visit our [Privacy Statement](#).

I'm not a robot  reCAPTCHA  
Privacy - Terms

**Sign Me Up**

## Activity 2: Account Activation



The image shows a screenshot of an email from Salesforce. The subject line is "Welcome to your Developer Edition". The email features a purple header with two white, blue, and black robotic characters on the left and right sides. The main body of the email is white with black text. It starts with "Hi Kim Lois," followed by a message about signing up for a Developer Edition and getting hands-on with Agentforce and Data Cloud. It includes a "Reset Password" button and a URL for logging in later. Below that, it provides the username "sangil.kimlois295@agentforce.com". A note states that the account remains active as long as it is used. At the bottom, there is a signature from "Developer Relations".

Hi Kim Lois,

Thanks for signing up for a Developer Edition. Now you can start building on Salesforce for free and get hands-on with Agentforce and Data Cloud.

There's just one more step. Use the following link to reset the password for your Developer Edition. This link expires in 24 hours.

[Reset Password](#)

To easily log in later, save this URL:  
<https://orgfarm-64edf6f990-dev-ed.develop.my.salesforce.com>

Here's the username for your Developer Edition:  
[sangil.kimlois295@agentforce.com](mailto:sangil.kimlois295@agentforce.com)

Your Developer Edition, now enabled with Agentforce and Data Cloud, remains active as long as you continue to use it. It expires after 45 days of non-use.

Again, welcome to Salesforce!  
Developer Relations

The screenshot shows the Salesforce login screen with the "salesforce" logo at the top. Below it, a modal window titled "Change Your Password" displays instructions: "Enter a new password for sangil.kimlois295@agentforce.com. Make sure to include at least:" followed by three requirements with green checkmarks: "8 characters", "1 letter", and "1 number". It also includes fields for "New Password" and "Confirm New Password", both showing "Good" and "Match" status respectively, with a note "Caps Lock is on." A navigation bar at the bottom includes icons for Home, Sales, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and More.

**Seller Home** Good morning, Kim Lois. Let's get selling!

**Close Deals** Opportunities owned by me and closing this quarter

- \$0 Total Pipeline
- \$0 Open
- \$0 Won
- \$0 Lost

[View Opportunities](#)

**Plan My Accounts** Accounts owned by me

- 0 Accounts
- 0 Upcoming Activity
- 0 Past Activity
- 0 No Activity

[View Accounts](#)

**Grow Relationships** Contacts owned by me and created in the last 90 days

- 0 Contacts
- 0 Upcoming Activity
- 0 Past Activity
- 0 No Activity

[View Contacts](#)

**Build Pipeline** Leads owned by me and created in the last 30 days

- 0 Upcoming Activity

**My Goals** Set personal weekly or monthly goals for emails, calls, and meetings.

**Today's Events**

- Icon: Sun and clouds
- Icon: Mountain range
- Icon: Bird

# Milestone 2: Objects Creation

## Activity 1: Creating a Customer Info Object

Customer Info	
Details	Details
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name <u>Customer_Info__c</u>
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label <u>Customer Info</u>
Field Sets	Plural Label <u>Customers Info</u>
Object Limits	
Record Types	
Related Lookup Filters	
Booking	
Details	Details
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name <u>Booking__c</u>
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label <u>Booking</u>
Field Sets	Plural Label <u>Bookings</u>
Object Limits	
Record Types	
Related Lookup Filters	
Booking Guest	
Details	Details
Fields & Relationships	Description
Page Layouts	
Lightning Record Pages	API Name <u>Booking_Guest__c</u>
Buttons, Links, and Actions	Custom ✓
Compact Layouts	Singular Label <u>Booking Guest</u>
Field Sets	Plural Label <u>Booking Guests</u>
Object Limits	
Record Types	
Related Lookup Filters	

SETUP > OBJECT MANAGER

## Travel Package

Details	Details	
Fields & Relationships	Description	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Page Layouts		
Lightning Record Pages	API Name Travel_Package__c	Enable Reports <input checked="" type="checkbox"/>
Buttons, Links, and Actions	Custom <input checked="" type="checkbox"/>	Track Activities <input checked="" type="checkbox"/>
Compact Layouts	Singular Label Travel Package	Track Field History <input checked="" type="checkbox"/>
Field Sets	Plural Label Travel Packages	Deployment Status Deployed
Object Limits		Help Settings Standard salesforce.com Help Window
Record Types		
Related Lookup Filters		

SETUP > OBJECT MANAGER

## Booking Payment

Details	Details	
Fields & Relationships	Description	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Page Layouts		
Lightning Record Pages	API Name Booking_Payment__c	Enable Reports <input checked="" type="checkbox"/>
Buttons, Links, and Actions	Custom <input checked="" type="checkbox"/>	Track Activities <input checked="" type="checkbox"/>
Compact Layouts	Singular Label Booking Payment	Track Field History <input checked="" type="checkbox"/>
Field Sets	Plural Label Booking Payments	Deployment Status Deployed
Object Limits		Help Settings Standard salesforce.com Help Window
Record Types		
Related Lookup Filters		

SETUP > OBJECT MANAGER

## Employee

Details		
Fields & Relationships	Description	
Page Layouts		
Lightning Record Pages	API Name <b>Employee__c</b>	Enable Reports <input checked="" type="checkbox"/>
Buttons, Links, and Actions	Custom <input checked="" type="checkbox"/>	Track Activities <input checked="" type="checkbox"/>
Compact Layouts	Singular Label <b>Employee</b>	Track Field History <input checked="" type="checkbox"/>
Field Sets	Plural Label <b>Employees</b>	Deployment Status <b>Deployed</b>
Object Limits		Help Settings
Record Types		Standard salesforce.com Help Window
Related Lookup Filters		<a href="#">Edit</a> <a href="#">Delete</a>

SETUP > OBJECT MANAGER

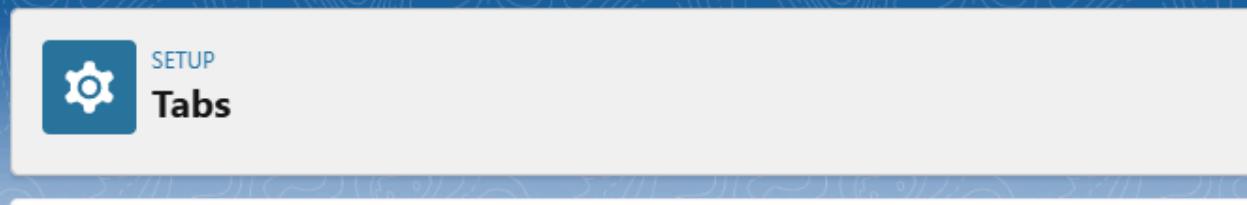
## Feedback

Details		
Fields & Relationships	Description	
Page Layouts		
Lightning Record Pages	API Name <b>Feedback__c</b>	Enable Reports <input checked="" type="checkbox"/>
Buttons, Links, and Actions	Custom <input checked="" type="checkbox"/>	Track Activities <input checked="" type="checkbox"/>
Compact Layouts	Singular Label <b>Feedback</b>	Track Field History <input checked="" type="checkbox"/>
Field Sets	Plural Label <b>Feedbacks</b>	Deployment Status <b>Deployed</b>
Object Limits		Help Settings
Record Types		Standard salesforce.com Help Window
Related Lookup Filters		<a href="#">Edit</a> <a href="#">Delete</a>

## Milestone 3: Objects Creation

**Activity 1: Creating a tab for Customer Info Object**

**Activity 2: Creating Remaining Tabs**



The screenshot shows the Salesforce Setup interface with the 'SETUP' button in the top-left corner and the 'Tabs' page selected. The main content area is titled 'Custom Tabs'.

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external content in a window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning Components to the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs		New	What Is This?
Action	Label	Tab Style	
Edit   Del	<a href="#">Booking_Guests</a>		Presenter
Edit   Del	<a href="#">Booking_Payments</a>		Credit card
Edit   Del	<a href="#">Bookings</a>		Phone
Edit   Del	<a href="#">Customers_Info</a>		People
Edit   Del	<a href="#">Employees</a>		Cup
Edit   Del	<a href="#">Feedbacks</a>		Form
Edit   Del	<a href="#">Travel_Packages</a>		Airplane

## Milestone 4: Fields & Relationships

### Activity 1: Creation of fields for the Customer Info Object

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

- Header:** SETUP / Picklist Value Sets
- Section Header:** Picklist Value Sets
- Description:** Global picklist value sets let you share the values across objects. The value set is restricted so users can't add their own values.
- View Options:** View: All ▾ Create New View
- Navigation:** A | B | C | D | E | F | G | H
- Table:** Global Value Sets

Action	Label ↑
<a href="#">Edit   Del</a>	City
<a href="#">Edit   Del</a>	Country
<a href="#">Deleted Global Value Sets (0)</a>	

## Global Value Set Detail

[Edit](#) [Delete](#)

### ▼ Information

Label	City
Name	City
Description	

### Picklist Values Used

Active and inactive picklist values 25 (1,000 max)

[Edit](#) [Delete](#)

<a href="#">Values</a>					
Action	Values	API Name	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Hyderabad	Hyderabad	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Mumbai	Mumbai	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Delhi	Delhi	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Bangalore	Bangalore	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Chennai	Chennai	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Alaminos	Alaminos	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Angeles City	Angeles City	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Palayan	Palayan	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Quezon City	Quezon City	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	San Juan	San Juan	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Riyadh	Riyadh	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Jeddah	Jeddah	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Tayma	Tayma	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Dammam	Dammam	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Medina	Medina	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	New York	New York	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Los Angeles	Los Angeles	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Chicago	Chicago	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Houston	Houston	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Columbus	Columbus	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Geneva	Geneva	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Basel	Basel	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Lausanne	Lausanne	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Bern	Bern	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Lucerne	Lucerne	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:37 PM</a>

## Global Value Set Detail

[Edit](#) [Delete](#)

### ▼ Information



Label	Country
Name	Country

Description

### Picklist Values Used

Active and inactive picklist values 14 (1,000 max)

[Edit](#) [Delete](#)

### Values

[New](#) [Reorder](#) [Replace](#) [Printable View](#) [Chart Colors ▾](#)

Action	Values	API Name	Default	Chart Colors	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	India	India	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Philippines	Philippines	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Saudi Arabia	Saudi Arabia	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	USA	USA	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Switzerland	Switzerland	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Thailand	Thailand	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Maldives	Maldives	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Dubai	Dubai	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Sri Lanka	Sri Lanka	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Bangkok	Bangkok	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Singapore	Singapore	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Myanmar	Myanmar	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	France	France	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Nepal	Nepal	<input type="checkbox"/>	Assigned dynamically	<a href="#">Kim Lois Sangil, 7/12/2025, 9:36 PM</a>

## Customer Info

Details	Fields & Relationships		
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Age	Age_c	Formula (Number)
Lightning Record Pages	City	City_c	Picklist
Buttons, Links, and Actions	Country	Country_c	Picklist
Compact Layouts	Created By	CreatedById	Lookup(User)
Field Sets	Customer Name	Name	Text(80)
Object Limits	Date of Birth	Date_of_Birth_c	Date
Record Types	Last Modified By	LastModifiedById	Lookup(User)
Related Lookup Filters	Owner	OwnerId	Lookup(User,Group)
Search Layouts			
List View Button Layout			

## Activity 2: Creating Lookup Relationship in Booking Object

SETUP > OBJECT MANAGER  
**Booking**

**Fields & Relationships**

Booking Custom Field  
**Guide Assigned**  
Back to Booking

Help for this Page ?

**Custom Field Definition Detail**

Field Information

Field Label	Guide Assigned	Object Name	Booking
Field Name	Guide_Assigned	Data Type	Lookup
API Name	Guide_Assigned__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By [Kim Lois Sangil](#), 7/12/2025, 9:59 PM Modified By [Kim Lois Sangil](#), 7/12/2025, 10:08 PM

Validation Rules [?]

**Lookup Options**

Related To	Employee	Child Relationship Name	Bookings
Related List Label	Bookings		
Required	<input type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

**Lookup Filter**

Filter Criteria	(Guide Assigned: Guide Role Assigned EQUALS Guide) AND (Guide Assigned: Availability Status EQUALS Available)
Filter Type	Required. The user-entered value must match filter criteria.
Error Message	Value does not exist or does not match filter criteria.
Lookup Window Text	
Active	<input checked="" type="checkbox"/>

**Validation Rules**

New Validation Rules Help [?]

No validation rules defined.

**Booking**

Details	Fields & Relationships		
Fields & Relationships	21 Items, Sorted by Field Label	Quick Find	New Deleted Fields Field Dependencies Set History Tracking
Page Layouts	Accomodation Amount per Person per Day	Accomodation_Amount_per_Person_per_Day	Formula (Currency)
Lightning Record Pages	Booking Name	Name	Text(80)
Buttons, Links, and Actions	Booking Status	Booking_Status__c	Picklist
Compact Layouts	Created By	CreatedBy	Lookup(User)
Field Sets	Customer	Customer__c	Lookup(Customer Info)
Object Limits	Guide Assigned	Guide_Assigned__c	Lookup(Employee)
Record Types	Last Modified By	LastModifiedBy	Lookup(User)
Related Lookup Filters	Membership	Membership__c	Picklist
Search Layouts	No of Booking Guests Info Available	No_of_Booking_Guests_Info_Available__c	Roll-Up Summary (COUNT Booking Guest)
List View Button Layout	Number of Travelers	Number_of_Travelers__c	Number(3, 0)
Restriction Rules	Owner	OwnerId	Lookup(User,Group)
Scoping Rules	Preferred Accommodation	Preferred_Accommodation__c	Picklist
Object Access	Preferred Guide Language	Preferred_Guide_Language__c	Picklist
Triggers	Total Accomodation Amount	Total_Accomodation_Amount__c	Formula (Currency)
Flow Triggers	Total Billing Amount	Total_Billing_Amount__c	Formula (Currency)
Validation Rules	Total Travel Amount	Total_Travel_Amount__c	Formula (Currency)
Conditional Field Formatting	Travel Cost Per Person	Travel_Cost_Per_Person__c	Formula (Currency)
	Travelling End Date	Travelling_End_Date__c	Formula (Date)
	Travelling Start Date	Travelling_Start_Date__c	Date
	TravelPackage	TravelPackage__c	Lookup(Travel Package)
	Trip Type	Trip_Type__c	Picklist

## Activity 3: Creation of fields for the Booking Guest Object

Booking Guest			
Details	Fields & Relationships		
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Age	Age__c	Number(3, 0)
Lightning Record Pages	Age Category	Age_Category__c	Formula (Text)
Buttons, Links, and Actions	Booking	Booking__c	Master-Detail(Booking)
Compact Layouts	Booking Guest Name	Name	Text(80)
Field Sets	Created By	CreatedBy	Lookup(User)
Object Limits	Last Modified By	LastModifiedBy	Lookup(User)
Record Types	Relation with Customer	Relation_with_Customer__c	Picklist
Related Lookup Filters			
Search Layouts			

## Activity 4: Creation of fields for the TravelPackage Object

Fields & Relationships			
11 Items, Sorted by Field Label			
	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Availability Status	Availability_Status__c	Picklist
Lightning Record Pages	Created By	CreatedById	Lookup(User)
Buttons, Links, and Actions	Duration in Days	Duration_in_Days__c	Number(3, 0)
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)
Field Sets	Meals Included	Meals_Included__c	Picklist
Object Limits	Membership	Membership__c	Picklist (Multi-Select)
Record Types	Owner	OwnerId	Lookup(User,Group)
Related Lookup Filters	Package Type	Package_Type__c	Picklist (Multi-Select)
Search Layouts	Price Per Person	Price_Per_Person__c	Currency(16, 2)
List View Button Layout	Transportation Modes	Transportation_Modes__c	Picklist (Multi-Select)
Restriction Rules	Travel Package Name	Name	Text(80)
Scoping Rules			
Object Access			
Triggers			

## Activity 5: Creation of fields for the Employee Object

Employee			
Details	Fields & Relationships		
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Assigned Region	Assigned_Region__c	Picklist
Lightning Record Pages	Availability Status	Availability_Status__c	Picklist
Buttons, Links, and Actions	City	City__c	Picklist
Compact Layouts	Country	Country__c	Picklist
Field Sets	Created By	CreatedBy	Lookup(User)
Object Limits	Department	Department__c	Picklist
Record Types	Employee Name	Name	Text(80)
Related Lookup Filters	Guide Role Assigned	Guide_Role_Assigned__c	Picklist
Search Layouts	Languages Spoken	Languages_Spoken__c	Picklist
List View Button Layout	Last Modified By	LastModifiedBy	Lookup(User)
Restriction Rules	Owner	OwnerId	Lookup(User,Group)
Scoping Rules	Role	Role__c	Picklist
Object Access			
Triggers			
Flow Triggers			

## Activity 6: Creation of fields for the Booking Payment Object

SETUP > OBJECT MANAGER

### Booking Payment

Details	Fields & Relationships		
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE
Page Layouts	Created By	CreatedBy	Lookup(User)
Lightning Record Pages	Last Modified By	LastModifiedBy	Lookup(User)
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)
Compact Layouts	Payment Method	Payment_Method_c	Picklist
Field Sets	Payment Name	Name	Text(80)
Object Limits			

# Milestone 5: Field Dependencies

## Activity 1: Creating a Field Dependency in BookingGuest Object

SETUP > OBJECT MANAGER

**Booking Guest**

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

**Booking Guest Field Dependencies**

< Back to Custom Object: Booking Guest

This page allows you to define dependencies between fields (e.g., dependent picklists).

**Field Dependencies**

New

Action	Controlling Field	Dependent Field	Modified By
Edit   Del	Country	City	Kim Lois Sangji, 7/12/2025, 11:59 PM

**Showing Columns: 1 - 5 (of 14) < Previous | Next > View All Go to**

Country:	India	Philippines	Saudi Arabia	USA	Switzerland
City:	Hyderabad	Hyderabad	Hyderabad	Hyderabad	Hyderabad
	Mumbai	Mumbai	Mumbai	Mumbai	Mumbai
	Delhi	Delhi	Delhi	Delhi	Delhi
	Bangalore	Bangalore	Bangalore	Bangalore	Bangalore
	Chennai	Chennai	Chennai	Chennai	Chennai
	Alaminos	Alaminos	Alaminos	Alaminos	Alaminos
	Angeles City				
	Palayan	Palayan	Palayan	Palayan	Palayan
	Quezon City				
	San Juan				
	Riyadh	Riyadh	Riyadh	Riyadh	Riyadh
	Jeddah	Jeddah	Jeddah	Jeddah	Jeddah
	Tayma	Tayma	Tayma	Tayma	Tayma
	Dammam	Dammam	Dammam	Dammam	Dammam
	Medina	Medina	Medina	Medina	Medina
	New York				
	Los Angeles				
	Chicago	Chicago	Chicago	Chicago	Chicago
	Houston	Houston	Houston	Houston	Houston
	Columbus	Columbus	Columbus	Columbus	Columbus
Country:	India	Philippines	Saudi Arabia	USA	Switzerland
City:	Geneva	Geneva	Geneva	Geneva	Geneva
	Basel	Basel	Basel	Basel	Basel
	Lausanne	Lausanne	Lausanne	Lausanne	Lausanne
	Bern	Bern	Bern	Bern	Bern
	Lucerne	Lucerne	Lucerne	Lucerne	Lucerne

**Showing Columns: 1 - 5 (of 14) < Previous | Next > View All**

## Activity 2: Creating a Field Dependency in Booking Object

		Showing Columns: 1 - 3 (of 3) < Previous   Next > View All ▶ Go to		
Membership:	Basic	Gold	VIP	
Preferred Accommodation:	Hotel	Hotel	Hotel	
	Resort	Resort	Resort	
	Guest House	Guest House	Guest House	
	Villa	Villa	Villa	
	Cottage	Cottage	Cottage	
	Luxury Hotel	Luxury Hotel	Luxury Hotel	
	No Preference	No Preference	No Preference	

Showing Columns: 1 - 3 (of 3) < Previous | Next > View All

SETUP > OBJECT MANAGER  
**Booking**

Details	Booking Field Dependencies															
	<p>« Back to Custom Object: Booking</p> <p>This page allows you to define dependencies between fields (e.g., dependent picklists).</p> <table border="1"> <thead> <tr> <th colspan="5">Field Dependencies</th> </tr> <tr> <th>Action</th> <th>Controlling Field</th> <th>Dependent Field</th> <th colspan="2">Modified By</th> </tr> </thead> <tbody> <tr> <td>Edit   Del</td> <td>Membership</td> <td>Preferred Accommodation</td> <td colspan="2">Kim Lois Sangil, 7/13/2025, 12:01 AM</td> </tr> </tbody> </table>	Field Dependencies					Action	Controlling Field	Dependent Field	Modified By		Edit   Del	Membership	Preferred Accommodation	Kim Lois Sangil, 7/13/2025, 12:01 AM	
Field Dependencies																
Action	Controlling Field	Dependent Field	Modified By													
Edit   Del	Membership	Preferred Accommodation	Kim Lois Sangil, 7/13/2025, 12:01 AM													

## Activity 3: Creating a Field Dependency in Employee Object

		Showing Columns: 1 - 5 (of 5) < Previous   Next > View All ▶ Go to				
Department:	Travel Operations	Finance	Support	Management	Logistics	
Role:	Travel Agent	Travel Agent	Travel Agent	Travel Agent	Travel Agent	
	Guide	Guide	Guide	Guide	Guide	
	Driver	Driver	Driver	Driver	Driver	
	Tour Coordinator	Tour Coordinator	Tour Coordinator	Tour Coordinator	Tour Coordinator	
	Finance Executive	Finance Executive	Finance Executive	Finance Executive	Finance Executive	
	Billing Analyst	Billing Analyst	Billing Analyst	Billing Analyst	Billing Analyst	
	Payment Processor	Payment Processor	Payment Processor	Payment Processor	Payment Processor	
	Support Staff	Support Staff	Support Staff	Support Staff	Support Staff	
	Customer Service Executive	Customer Service Executive	Customer Service Executive	Customer Service Executive	Customer Service Executive	
	Manager	Manager	Manager	Manager	Manager	
	Operations Supervisor	Operations Supervisor	Operations Supervisor	Operations Supervisor	Operations Supervisor	
	Admin	Admin	Admin	Admin	Admin	
	Logistics Coordinator	Logistics Coordinator	Logistics Coordinator	Logistics Coordinator	Logistics Coordinator	
	Accommodation Manager	Accommodation Manager	Accommodation Manager	Accommodation Manager	Accommodation Manager	
	Transportation Manager	Transportation Manager	Transportation Manager	Transportation Manager	Transportation Manager	

Showing Columns: 1 - 5 (of 5) < Previous | Next > View All

## Employee Field Dependencies

« Back to Custom Object: Employee

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies				
Action	Controlling Field	Dependent Field	Modified By	
Edit   Del	Department	Role	Kim Lois Sangil, 7/13/2025, 12:05 AM	

## Activity 4: Creating another Field Dependency in Employee Object

Country:		<u>India</u>	<u>Philippines</u>	<u>Saudi Arabia</u>	<u>USA</u>	<u>Switzerland</u>
City:		Hyderabad	Hyderabad	Hyderabad	Hyderabad	Hyderabad
	Mumbai	Mumbai	Mumbai	Mumbai	Mumbai	Mumbai
	Delhi	Delhi	Delhi	Delhi	Delhi	Delhi
	Bangalore	Bangalore	Bangalore	Bangalore	Bangalore	Bangalore
	Chennai	Chennai	Chennai	Chennai	Chennai	Chennai
	Alaminos	Alaminos	Alaminos	Alaminos	Alaminos	Alaminos
	Angeles City	Angeles City	Angeles City	Angeles City	Angeles City	Angeles City
	Palayan	Palayan	Palayan	Palayan	Palayan	Palayan
	Quezon City	Quezon City	Quezon City	Quezon City	Quezon City	Quezon City
	San Juan	San Juan	San Juan	San Juan	San Juan	San Juan
	Riyadh	Riyadh	Riyadh	Riyadh	Riyadh	Riyadh
	Jeddah	Jeddah	Jeddah	Jeddah	Jeddah	Jeddah
	Tayma	Tayma	Tayma	Tayma	Tayma	Tayma
	Dammam	Dammam	Dammam	Dammam	Dammam	Dammam
	Medina	Medina	Medina	Medina	Medina	Medina
	New York	New York	New York	New York	New York	New York
	Los Angeles	Los Angeles	Los Angeles	Los Angeles	Los Angeles	Los Angeles
	Chicago	Chicago	Chicago	Chicago	Chicago	Chicago
	Houston	Houston	Houston	Houston	Houston	Houston
	Columbus	Columbus	Columbus	Columbus	Columbus	Columbus
Country:	<u>India</u>	<u>Philippines</u>	<u>Saudi Arabia</u>	<u>USA</u>	<u>Switzerland</u>	
City:	Geneva	Geneva	Geneva	Geneva	Geneva	
	Basel	Basel	Basel	Basel	Basel	
	Lausanne	Lausanne	Lausanne	Lausanne	Lausanne	
	Bern	Bern	Bern	Bern	Bern	
	Lucerne	Lucerne	Lucerne	Lucerne	Lucerne	

Showing Columns: 1 - 5 (of 14) < Previous | Next > [View All](#)

## Employee Field Dependencies

[« Back to Custom Object: Employee](#)

This page allows you to define dependencies between fields (e.g., dependent picklists).

Field Dependencies				<a href="#">New</a>
Action	Controlling Field	Dependent Field	Modified By	
<a href="#">Edit</a>   <a href="#">Del</a>	Country	City	Kim Lois Sangil, 7/13/2025, 12:08 AM	
<a href="#">Edit</a>   <a href="#">Del</a>	Department	Role	Kim Lois Sangil, 7/13/2025, 12:05 AM	

## Milestone 6: Validation Rules

### Activity 1: To create validation rules to a Customer Info Object

#### Validation Rules

3 Items, Sorted by Rule Name

RULE NAME	▲ ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email_Valid_Address	Email	Please Enter Valid Email Address	✓	Kim Lois Sangil, 7/13/2025, 12:18 AM
Phone_Number_Must_10_Digits	Phone	Phone Number Must Be 10 Digits	✓	Kim Lois Sangil, 7/13/2025, 12:16 AM
Prevent_Future_DOB	Date of Birth	Date of Birth cannot be in the future	✓	Kim Lois Sangil, 7/13/2025, 12:18 AM

## **Activity 2: To create validation rules to a BookingGuest Object**

### **Validation Rules**

1 Items, Sorted by Rule Name

RULE NAME	▲ ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Age_must_be_greater_than_0	Age	Age must be greater than 0	✓	Kim Lois Sangil, 7/13/2025, 12:20 AM

## **Activity 3: To create validation rules to a Employee Object**

### **Validation Rules**

2 Items, Sorted by Rule Name

RULE NAME	▲ ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Email_is_mandatory	Email	You Must Enter the Email	✓	Kim Lois Sangil, 7/13/2025, 12:24 AM
Language_Must_be_Selected	Languages Spoken	You Must Select Language	✓	Kim Lois Sangil, 7/13/2025, 12:28 AM

## **Activity 4: To create validation rules to a Booking Object**

### **Validation Rules**

1 Items, Sorted by Rule Name

RULE NAME	▲ ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Enforce_Pending_Status_On_Create	Booking Status	'Pending' when a new record is created.	✓	Kim Lois Sangil, 7/13/2025, 12:34 AM

# Milestone 7: Approval Process

## Activity 1: Create an approval process for Booking Cancellation Approval

Approval Processes

Booking: Booking Cancellation Approval

Help for this Page

[« Back to Approval Process List](#)

Process Definition Detail		<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Deactivate</a>		
Process Name	Booking Cancellation Approval	Active	<input checked="" type="checkbox"/>	
Unique Name	Booking_Cancellation_Approval	Next Automated Approver Determined By	Manager of Record Submitter	
Description				
Entry Criteria	(Booking: Booking Status EQUALS Cancelled) AND (Booking: Cancel Confirmation EQUALS True)			
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests <input type="checkbox"/>		
Approval Assignment Email Template	<a href="#">Booking Cancellation Approval Notification</a>			
Initial Submitters	Booking Owner, <a href="#">Role: Travel Agent</a>			
Created By	<a href="#">Kim Lois Sangil</a> , 7/13/2025, 1:38 AM Modified By <a href="#">Kim Lois Sangil</a> , 7/13/2025, 3:23 AM			

Initial Submission Actions		<a href="#">Add Existing</a> <a href="#">Add New</a>
Action	Type	Description
Record Lock		Lock the record from being edited
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Set Booking Status to Pending</a>

Approval Steps					
Action	Step Number	Name	Description	Criteria	Assigned Approver
<a href="#">Show Actions</a>   <a href="#">Edit</a>	1	Travel Agent Manager Approval			User <a href="#">Kim Lois Sangil</a>
					Final Rejection

Final Approval Actions		<a href="#">Add Existing</a> <a href="#">Add New</a>
Action	Type	Description
Edit	Record Lock	Lock the record from being edited
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	<a href="#">Cancellation Approved</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Set Approval Status to Approved</a>

Final Rejection Actions		<a href="#">Add Existing</a> <a href="#">Add New</a>
Action	Type	Description
Edit	Record Lock	Unlock the record for editing
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Booking Status to Confirmed</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	Field Update	<a href="#">Approval Status to Rejected</a>
<a href="#">Edit</a>   <a href="#">Remove</a>	Email Alert	<a href="#">Send Approval Rejection Email to the User</a>

Recall Actions		<a href="#">Add Existing</a> <a href="#">Add New</a>
Action	Type	Description
	Record Lock	Unlock the record for editing

[^ Back To Top](#)

Always show me [more](#) records per related list

## Milestone 8: Flows

**Activity 1: Create a Flow to ensure that the number of BookingGuest records does not exceed the number of Travellers specified in the related Booking record, if exceeds Popup an error to prevent saving**

The screenshot shows the Salesforce Flow Builder interface with the following details:

- Flow Details:** Name: Show Error if Guests > Travellers - V1, Status: Active.
- Toolbox:** Shows various flow elements like Record Triggered Flow, Get Records, Decision, and Error Message.
- Manager:** Shows the flow's configuration with Object: Booking Guest, Trigger: A record is created or updated, and Optimized for: Fast Field Updates.
- Resources:** Includes Decision Outcomes (1), Record Collection Variables (1), Text Templates (1), and Custom Error Messages (1).
- Elements:** Includes a Custom Error Message component for handling errors.
- Flow Diagram:**

```

graph TD
    Start((Record Triggered Flow)) --> GetRecords[Get Booking Records]
    GetRecords --> Decision{To Check Guests > Travellers}
    Decision -- Yes --> ErrorMessage[Error Message]
    Decision -- Default Outcome --> End([End])
    ErrorMessage --> End
  
```
- Custom Error Message Component:** Configured with Label: Error Message, API Name: Error\_Message, and Description: (Optional).

Flow Show Error if Guests > Travellers					
Type	Associated Record	Progress Status	Last Modified Date	Flow Owner	
Record—Run Before Save		Activated	7/13/2025, 3:34 AM	Kim Lois Sangil	

## Milestone 9: Workflows

**Activity 1: Automatically create a Task for the Travel Agent to follow up with the customer for feedback, Due date is 3 days after the Travelling End Date, whenever a booking is marked as Completed**

Workflow Rule Help for this Page 

Follow-up Task After Booking Completion

 Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Workflow Rule Detail			
Rule Name	Follow-up Task After Booking Completion	Edit	Clone
Active	<input checked="" type="checkbox"/>	Object	Booking
		Evaluation Criteria	Evaluate the rule when a record is created, and every time it's edited
Description			
Rule Criteria	Booking: Booking Status EQUALS Completed		
Created By	<a href="#">Kim Lois Sangil</a> , 7/13/2025, 3:37 AM		
Modified By	<a href="#">Kim Lois Sangil</a> , 7/13/2025, 3:39 AM		

**Workflow Actions** Edit

**Immediate Workflow Actions**

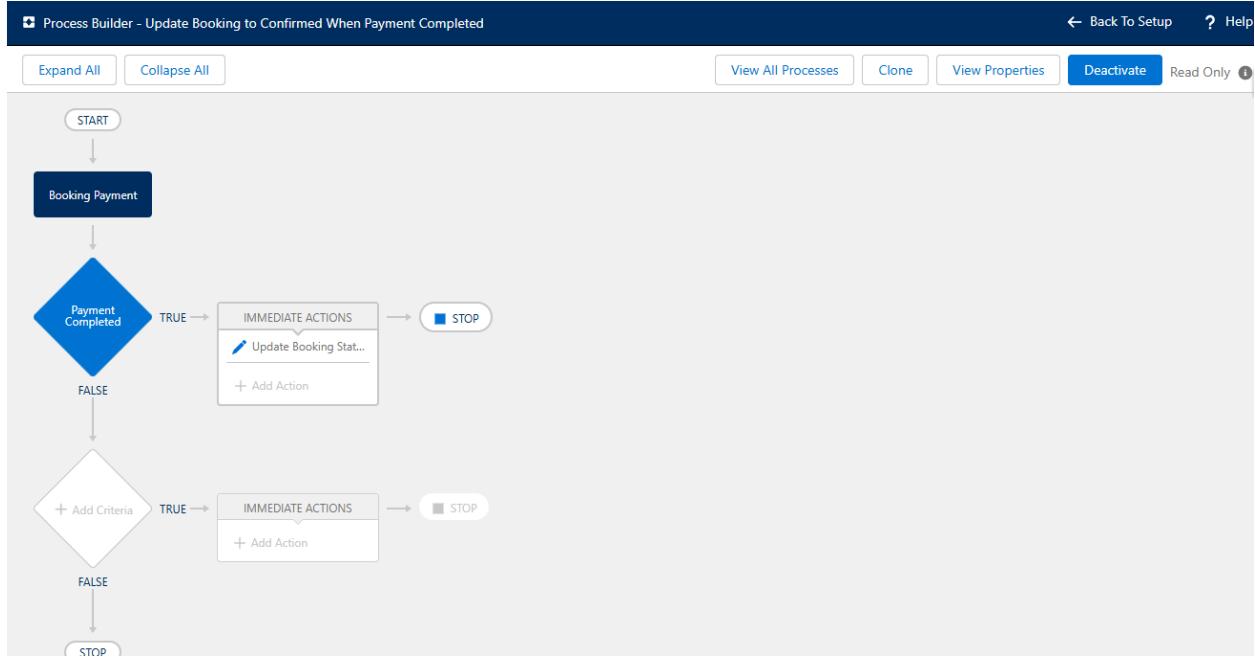
Type	Description
Task	Follow up for feedback

**Time-Dependent Workflow Actions** [See an example](#)

 You cannot add time-dependent workflow actions because your evaluation criteria is "Every time a record is created or edited". [Change Evaluation Criteria](#)

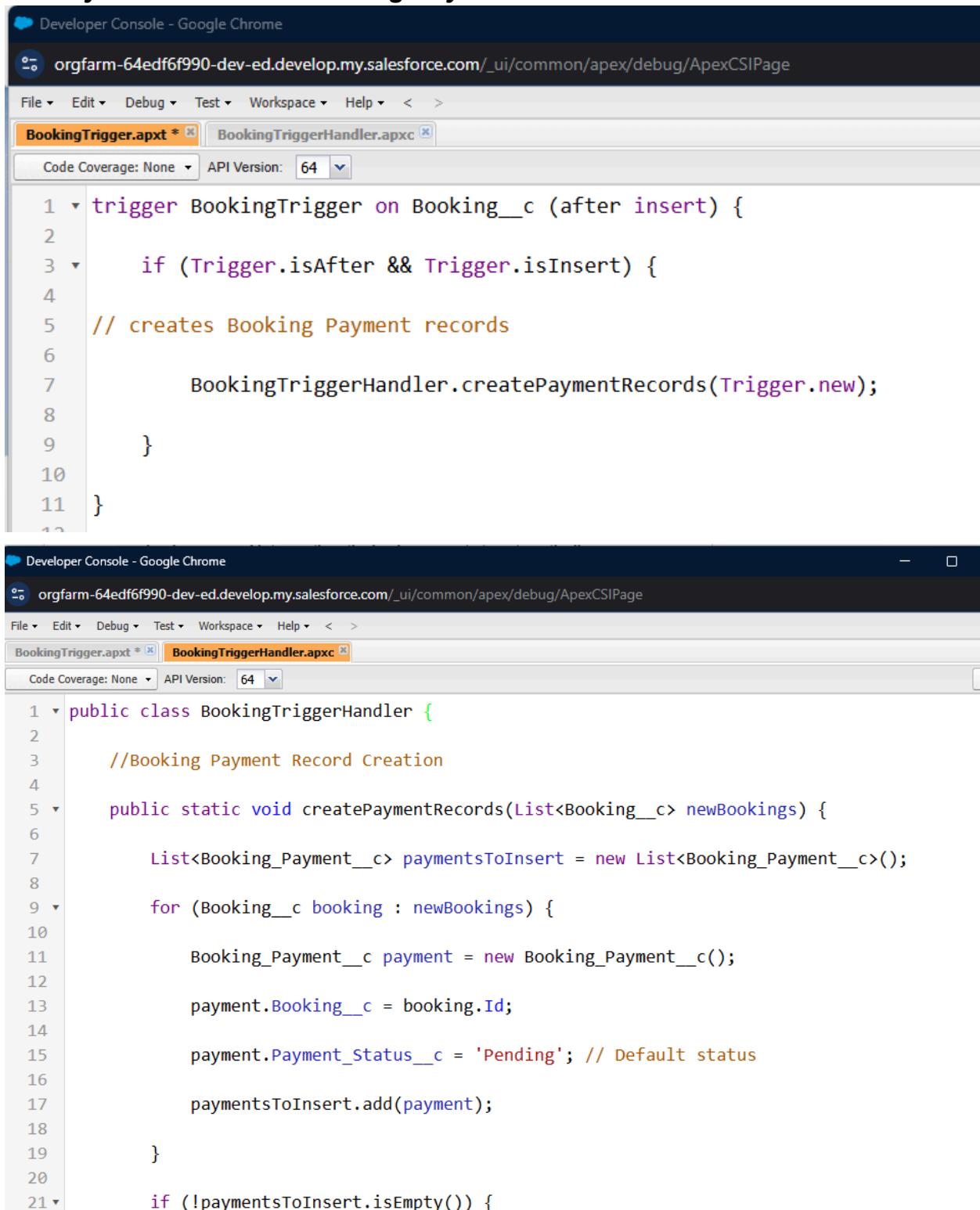
## Milestone 10: Process Builder

**Activity 1: The Tours and Travels CRM application manages bookings and payments for various tour packages worldwide. To streamline operations and reduce manual intervention, the business wants to automatically update the Booking status to “Confirmed” once the payment is successfully completed**



## Milestone 11: Triggers

### Activity 1: Auto-create Booking Payment Method



The image shows two screenshots of the Salesforce Developer Console. Both screenshots have a dark header bar with the text "Developer Console - Google Chrome" and the URL "orgfarm-64edf6f990-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage". Below the header is a menu bar with "File", "Edit", "Debug", "Test", "Workspace", "Help", and navigation icons. The top screenshot shows the "BookingTrigger.apxt" tab selected, containing the following Apex trigger code:

```
trigger BookingTrigger on Booking__c (after insert) {
    if (Trigger.isAfter && Trigger.isInsert) {
        // creates Booking Payment records
        BookingTriggerHandler.createPaymentRecords(Trigger.new);
    }
}
```

The bottom screenshot shows the "BookingTriggerHandler.apxc" tab selected, containing the following Apex class code:

```
public class BookingTriggerHandler {
    //Booking Payment Record Creation
    public static void createPaymentRecords(List<Booking__c> newBookings) {
        List<Booking_Payment__c> paymentsToInsert = new List<Booking_Payment__c>();
        for (Booking__c booking : newBookings) {
            Booking_Payment__c payment = new Booking_Payment__c();
            payment.Booking__c = booking.Id;
            payment.Payment_Status__c = 'Pending'; // Default status
            paymentsToInsert.add(payment);
        }
        if (!paymentsToInsert.isEmpty()) {
    }
}
```

## Activity 2: Automate Guest Records Creation Based on Traveller Count

The screenshot displays two instances of the Salesforce Developer Console. The top instance shows the code for the `BookingTriggerHandler.apxc` class, which contains logic to create `Booking_Guest__c` records based on the number of travelers in a booking. The bottom instance shows the `BookingTrigger.apxt` trigger, which is triggered after an insert on the `Booking__c` object, calling the `createPaymentRecords` and `createBookingGuests` methods from the handler.

```
//BookingGuests records Creation
public static void createBookingGuests(List<Booking__c> bookings) {
    List<Booking_Guest__c> guestsToInsert = new List<Booking_Guest__c>();
    for (Booking__c booking : bookings) {
        Integer count = (Integer)booking.Number_of_Travelers__c;
        for (Integer i = 1; i <= count; i++) {
            Booking_Guest__c guest = new Booking_Guest__c();
            guest.Booking__c = booking.Id;
            guest.Name = 'Guest ' + i; // Optional
            guestsToInsert.add(guest);
    }
}

trigger BookingTrigger on Booking__c (after insert) {
    if (Trigger.isAfter && Trigger.isInsert) {
        // creates Booking Payment records
        BookingTriggerHandler.createPaymentRecords(Trigger.new);
        // creates BookingGuests records
        BookingTriggerHandler.createBookingGuests(Trigger.new);
    }
}
```

## **Test Booking:**

Booking  
**Angeles-Booking1**

**Related** Details

**Booking Guests (2)** New

**Booking Guest Name**

Guest 1 ▼

Guest 2 ▼

[View All](#)

**Approval History (0)**

**Booking Payments (1)** New

**Payment Name**

a04gL000006hRzQ ▼

[View All](#)

Apex Debug Log  
**Kim Lois Sangil**

**Apex Debug Log Detail**

User	<u>Kim Lois Sangil</u>
Status	Success
Request Type	Application
Duration (ms)	309

# Milestone 12: Asynchronous Apex

## **Activity 1: Future Asynchronous Apex**

Developer Console - Google Chrome

orgfarm-64edf6f990-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

BookingConfirmationEmailer.apxc BookingTrigger.apxt

Code Coverage: None API Version: 64 G

```
1 public class BookingConfirmationEmailer {  
2  
3     @future(callout=false)  
4  
5     public static void sendBookingConfirmation(Set<Id> bookingIds) {  
6  
7         List<Messaging.SingleEmailMessage> emails = new List<Messaging.SingleEmailMessage>();  
8  
9         List<Booking__c> bookings = [SELECT Id, Name, Customer_Email__c, Total_Billing_Amo  
10                                         FROM Booking__c  
11                                         WHERE Id IN :bookingIds];  
12  
13         for (Booking__c booking : bookings) {  
14             if (String.isNotBlank(booking.Customer_Email__c)) {  
15                 Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();  
16                 mail.setTo(booking.Customer_Email__c);  
17                 mail.setSubject('Booking Confirmation');  
18                 mail.setPlainTextBody('Hello ' + booking.Name + ',  
19  
20                         Your booking has been confirmed.  
21                         Thank you for choosing us.  
22                         Best regards,  
23                         The Booking Team');  
24                 emails.add(mail);  
25             }  
26         }  
27         Messaging.sendEmail(emails);  
28     }  
29 }
```

Developer Console - Google Chrome

orgfarm-64edf6f990-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

BookingConfirmationEmailer.apxc BookingTrigger.apxt

Code Coverage: None API Version: 64 Go

```
1 trigger BookingTrigger on Booking__c (after insert, after update) {
2
3     if (Trigger.isAfter && Trigger.isInsert) {
4
5         // creates Booking Payment records
6
7         BookingTriggerHandler.createPaymentRecords(Trigger.new);
8
9
10    // creates BookingGuests records
11
12    BookingTriggerHandler.createBookingGuests(Trigger.new);
13
14 }
15
16 else if (Trigger.isAfter && Trigger.isUpdate) {
17
18     Set<Id> bookingIdsToSend = new Set<Id>();
19
20     for (Booking__c booking : Trigger.new) {
21 }
```

## Test Booking:

Booking "NiceBooking" was created.

Related	Details
Booking Name NiceBooking	Owner  Kim Lois Sangil 
Customer <a href="#">Clarisse Cench</a>	
Guide Assigned	
Travelling Start Date	
TravelPackage	
Number of Travelers 3	
Preferred Accommodation	
Booking Number BK-0008	
Cancellation Reason	
Approval Status	
Customer Email <a href="mailto:goodam@testemail.com">goodam@testemail.com</a>	
Created By  Kim Lois Sangil, 7/13/2025, 6:28 AM	Last Modified By  Kim Lois Sangil, 7/13/2025, 6:28 AM

```
06:28:52.17 (98333628)|EMAIL_QUEUE|[47]|subject: Booking Confirmed: NiceBooking, bccSender: false, saveA  
Your booking has been confirmed. Please find the details below:  
Booking ID: NiceBooking  
Total Bill Amount Paid: $0.00  
  
Thank you for booking with us!,  
06:28:52.17 (98681665)|HEAP_ALLOCATE|[EXTERNAL]|Bytes:8  
06:28:52.98 (98726490)|CUMULATIVE_LIMIT_USAGE  
06:28:52.98 (98726490)|LIMIT_USAGE_FOR_NS|(default)|  
Number of SQL queries: 1 out of 200  
Number of query rows: 1 out of 50000  
Number of SOSL queries: 0 out of 20  
Number of DML statements: 0 out of 150  
Number of Publish Immediate DML: 0 out of 150  
Number of DML rows: 0 out of 10000  
Maximum CPU time: 0 out of 60000  
Maximum heap size: 0 out of 12000000  
Number of callouts: 0 out of 100  
Number of Email Invocations: 1 out of 10  
Number of future calls: 0 out of 50  
Number of queueable jobs added to the queue: 0 out of 1  
Number of Mobile Apex push calls: 0 out of 10  
  
06:28:52.98 (98726490)|CUMULATIVE_LIMIT_USAGE_END  
  
06:28:52.17 (98763339)|CODE_UNIT_FINISHED|BookingConfirmationEmailer.sendBookingConfirmation(Set<Id>)  
06:28:52.17 (98774794)|EXECUTION_FINISHED
```

## Booking Confirmed: NiceBooking

Spam x



Kim Lois Sangil [sangil.kimlois@auf.edu.ph](mailto:sangil.kimlois@auf.edu.ph) via ns6cvlh0b3ql6jgu.uz8.gl-6condu... 9:31PM (2 minutes ago)



Why is this message in spam? This message is similar to messages that were identified as spam in the past.

[Report not spam](#)



Dear Customer,

Your booking has been confirmed. Please find the details below:  
Booking ID: NiceBooking  
Total Bill Amount Paid: \$0.00

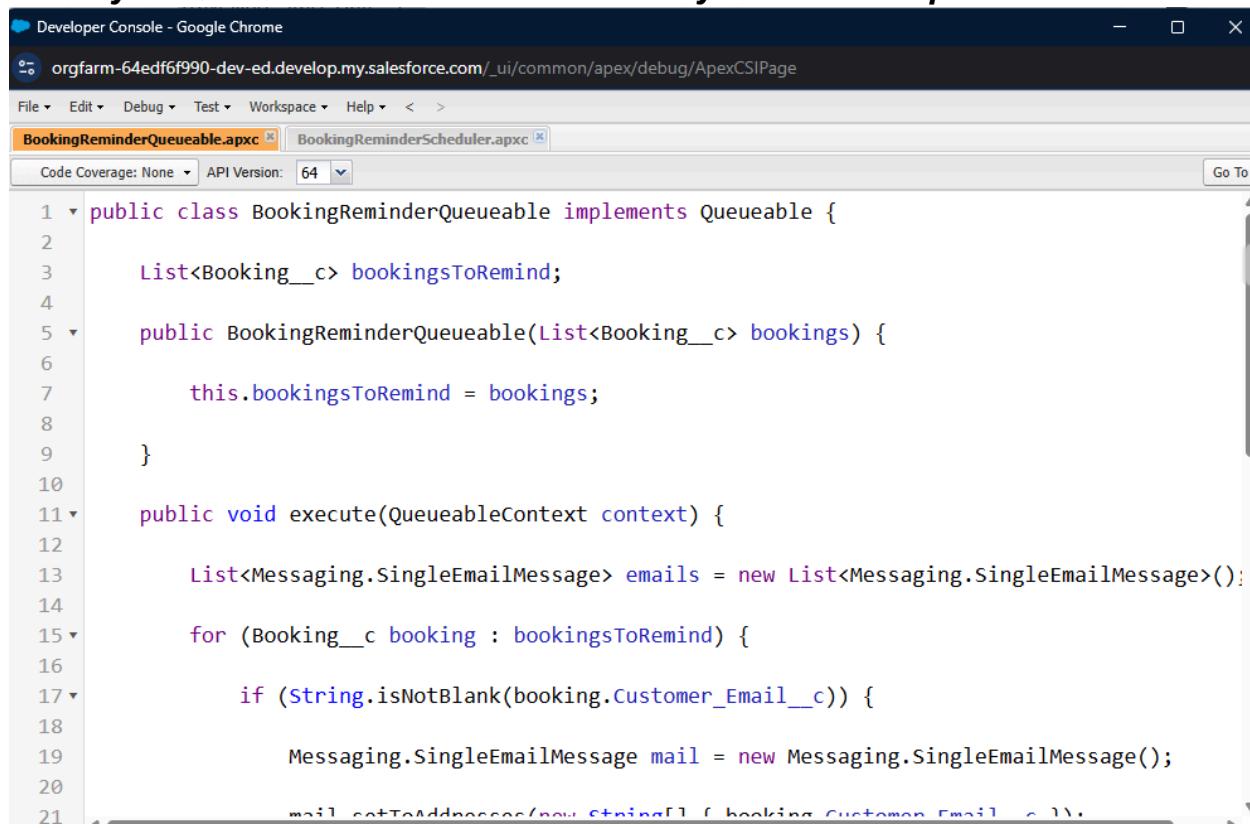
Thank you for booking with us!

[Reply](#)

[Forward](#)

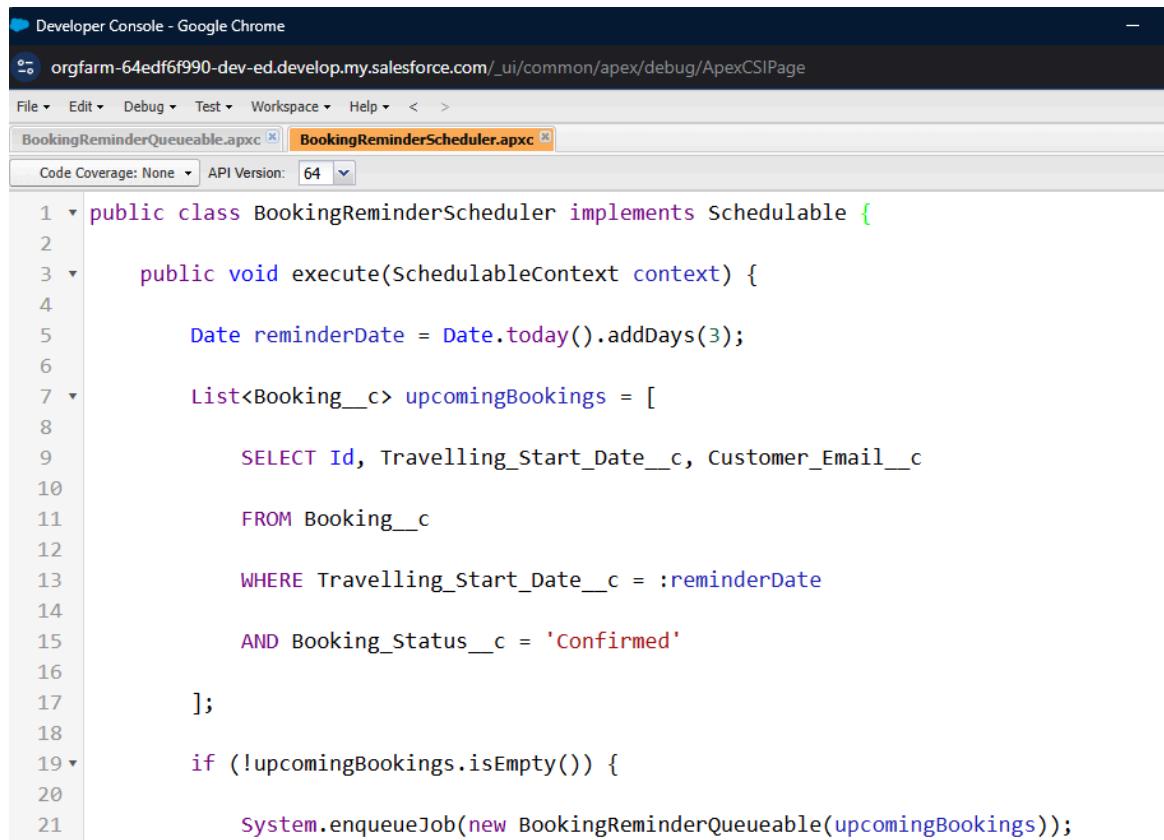


## Activity 2: Queueable and Schedulable Asynchronous Apex



The screenshot shows the Salesforce Developer Console interface with two tabs open: "BookingReminderQueueable.apxc" and "BookingReminderScheduler.apxc". The code editor displays the implementation for both classes.

```
1 public class BookingReminderQueueable implements Queueable {
2
3     List<Booking__c> bookingsToRemind;
4
5     public BookingReminderQueueable(List<Booking__c> bookings) {
6
7         this.bookingsToRemind = bookings;
8     }
9
10    public void execute(QueueableContext context) {
11
12        List<Messaging.SingleEmailMessage> emails = new List<Messaging.SingleEmailMessage>();
13
14        for (Booking__c booking : bookingsToRemind) {
15
16            if (String.isNotBlank(booking.Customer_Email__c)) {
17
18                Messaging.SingleEmailMessage mail = new Messaging.SingleEmailMessage();
19
20                mail.setToAddress(new String[] { booking.Customer_Email__c });
21
22                // Additional code for sending email...
23
24        }
25    }
26
27    public void handleException(QueueableContext context, Exception e) {
28
29        // Error handling logic...
30    }
31}
```



The screenshot shows the Salesforce Developer Console interface with the "BookingReminderScheduler.apxc" tab selected. The code editor displays the implementation for the Schedulable class.

```
1 public class BookingReminderScheduler implements Schedulable {
2
3     public void execute(SchedulableContext context) {
4
5         Date reminderDate = Date.today().addDays(3);
6
7         List<Booking__c> upcomingBookings = [
8
9             SELECT Id, Travelling_Start_Date__c, Customer_Email__c
10            FROM Booking__c
11
12            WHERE Travelling_Start_Date__c = :reminderDate
13
14            AND Booking_Status__c = 'Confirmed'
15
16        ];
17
18        if (!upcomingBookings.isEmpty()) {
19
20            System.enqueueJob(new BookingReminderQueueable(upcomingBookings));
21
22        }
23    }
24
25    public void handleException(SchedulableContext context, Exception e) {
26
27        // Error handling logic...
28    }
29}
```

## All Scheduled Jobs

[Help for this Page](#)

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

Percentage of Scheduled Jobs Used: 1%  
You have currently used 1 scheduled Apex jobs out of an allowed organization limit of 100 active or scheduled jobs. To learn about how this limit is calculated and what contributes to it see the [Lightning Platform Apex Limits](#) topic.

View: [All Scheduled Jobs](#) [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

Schedule Apex						
Action	Job Name ↑	Submitted By	Submitted	Started	Next Scheduled Run	Type
<a href="#">Manage</a>   <a href="#">Del</a>   <a href="#">Pause Job</a>	Daily Booking Reminder Job	Sangil_Kim Lois	7/13/2025, 6:37 AM		7/14/2025, 6:00 AM	Scheduled Apex
<a href="#">08egL000007Xudi</a>						

[Click here to go to the new batch jobs page](#)

## Apex Jobs

Monitor the status of all Apex jobs, and optionally, abort jobs that are in progress.

Percent of Asynchronous Apex Used: 0%  
You have currently used 4 asynchronous Apex operations out of an allowed 24-hour organization limit of 250,000. To learn about how this limit is calculated and what [Apex Limits](#) topic.

View: [All](#) [Create New View](#)

Action	Submitted Date	Job Type	Status	Status Detail	Total Batches	Batches Processed	Failures	Submitted By	Completion Date	Apex Class
	7/13/2025, 6:37 AM	Scheduled Apex	Queued		0	0	0	Sangil_Kim Lois		BookingReminderScheduler

Developer Console - Google Chrome

orgfarm-64edf6f990-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >

BookingReminderQueueable.apxc BookingReminderScheduler.apxc Log executeAnonymous @7/13/2025, 9:37:40 PM

**Execution Log**

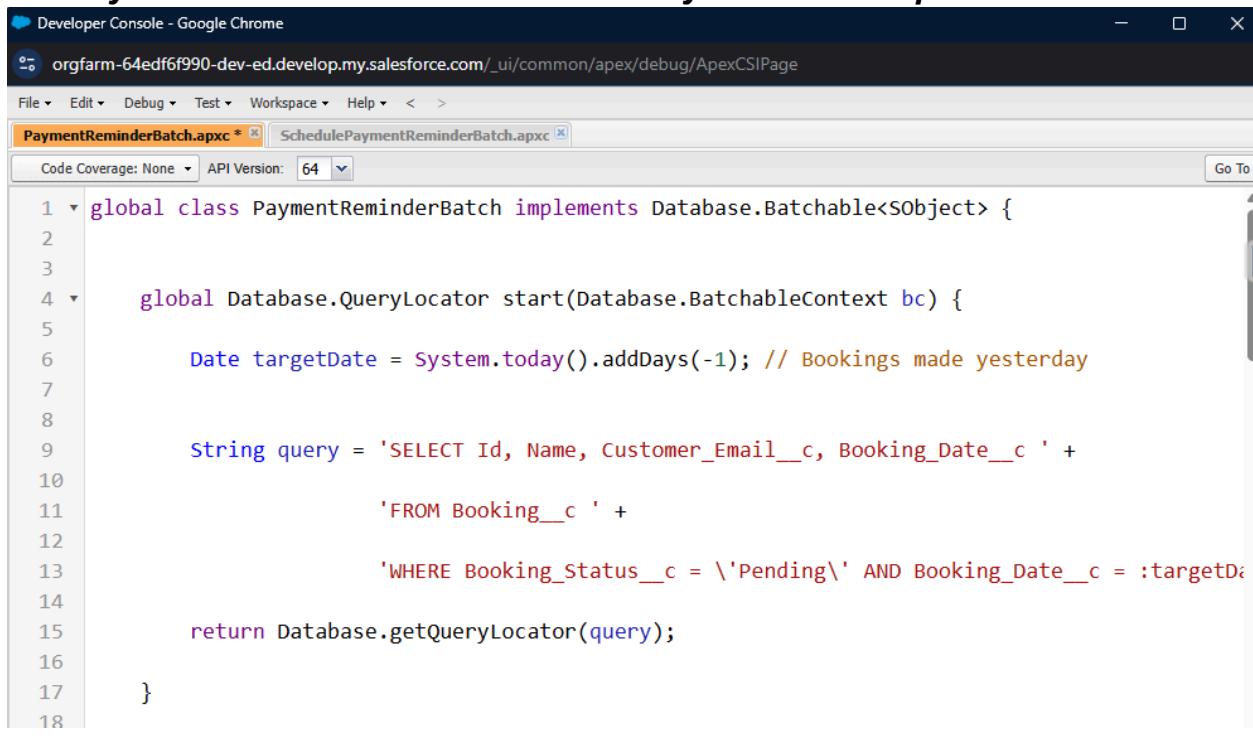
Timestamp	Event	Details
21:37:40:001	USER_INFO	[EXTERNAL]005gL000004h7K5 sangil.kimlois295@agentforce.com (GMT-07:00) Pacific Daylight Time (America/Los_Angeles) GMT-07:00
21:37:40:001	EXECUTION_ST...	
21:37:40:001	CODE_UNIT_ST...	[EXTERNAL]execute_anonymous_apex
21:37:40:001	VARIABLE_SCO...	[1]cronExp[String]false false
21:37:40:001	HEAP_ALLOCATE	[93]Bytes:3
21:37:40:001	HEAP_ALLOCATE	[98]Bytes:152
21:37:40:001	HEAP_ALLOCATE	[415]Bytes:408
21:37:40:001	HEAP_ALLOCATE	[428]Bytes:408
21:37:40:001	HEAP_ALLOCATE	[536]Bytes:48
21:37:40:001	HEAP_ALLOCATE	[247]Bytes:6
21:37:40:001	HEAP_ALLOCATE	[EXTERNAL]Bytes:3
21:37:40:001	STATEMENT_EX...	[1]
21:37:40:001	STATEMENT_EX...	[1]
21:37:40:001	HEAP_ALLOCATE	[1]Bytes:11
21:37:40:001	VARIABLE_ASSI...	[1]cronExp "0 0 6 * *?"
21:37:40:001	STATEMENT_EX...	[3]
21:37:40:001	HEAP_ALLOCATE	[3]Bytes:26
21:37:40:012	HEAP_ALLOCATE	[3]Bytes:1
21:37:40:012	METHOD_ENTRY	[1]01pgL000003TFbT BookingReminderScheduler.BookingReminderScheduler()
21:37:40:013	STATEMENT_EX...	[1]
21:37:40:013	STATEMENT_EX...	[1]

This Frame Executable Debug Only Filter Click here to filter the log

Logs Tests Checkpoints Query Editor View State Progress Problems

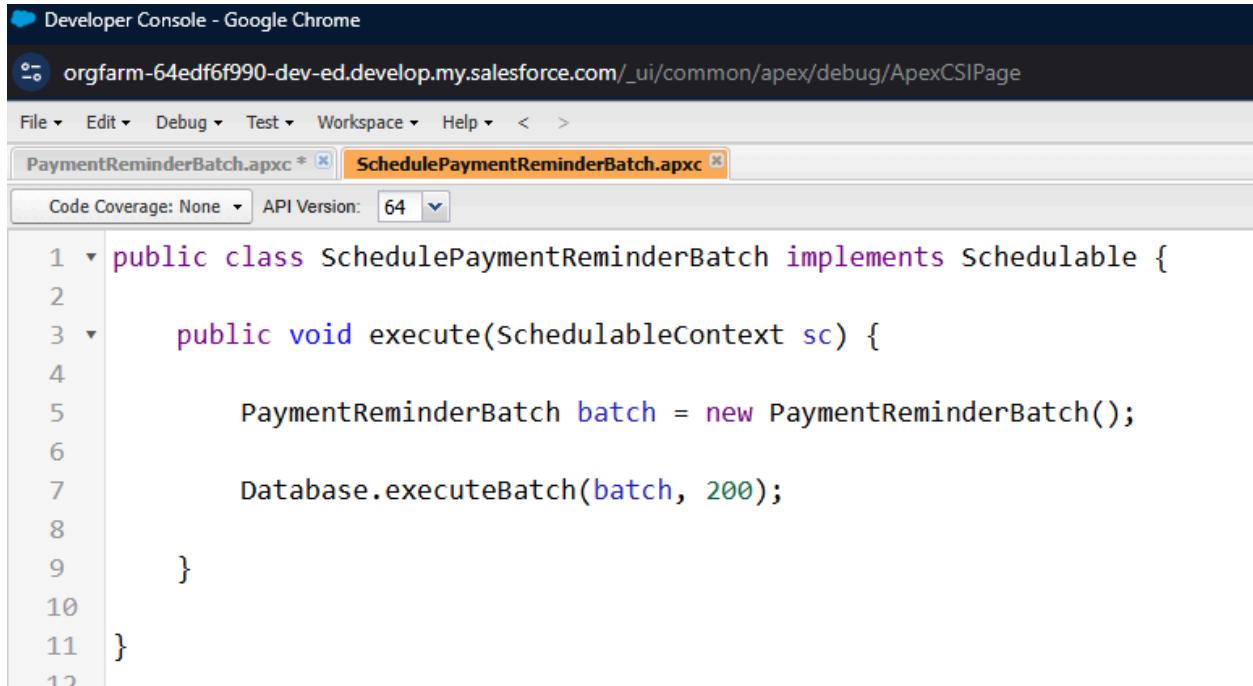
User	Application	Operation	Time	Status	Read	Size
Kim Lois Sangil	Unknown	/services/data/v64.0/to...	7/13/2025, 9:37:40 PM	Success		3.15 KB

### Activity 3: Batchable and Schedulable Asynchronous Apex



The screenshot shows the Salesforce Developer Console interface. The title bar says "Developer Console - Google Chrome" and the URL is "orgfarm-64edf6f990-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage". The tabs at the top are "PaymentReminderBatch.apxc" (selected) and "SchedulePaymentReminderBatch.apxc". The code editor displays the following Apex class:

```
1 global class PaymentReminderBatch implements Database.Batchable<SObject> {
2
3     global Database.QueryLocator start(Database.BatchableContext bc) {
4
5         Date targetDate = System.today().addDays(-1); // Bookings made yesterday
6
7
8         String query = 'SELECT Id, Name, Customer_Email__c, Booking_Date__c '
9                 + 'FROM Booking__c '
10                + 'WHERE Booking_Status__c = \'Pending\' AND Booking_Date__c = :targetDa
11
12         return Database.getQueryLocator(query);
13
14     }
15
16 }
```



The screenshot shows the Salesforce Developer Console interface. The title bar says "Developer Console - Google Chrome" and the URL is "orgfarm-64edf6f990-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage". The tabs at the top are "PaymentReminderBatch.apxc" and "SchedulePaymentReminderBatch.apxc" (selected). The code editor displays the following Apex class:

```
1 public class SchedulePaymentReminderBatch implements Schedulable {
2
3     public void execute(SchedulableContext sc) {
4
5         PaymentReminderBatch batch = new PaymentReminderBatch();
6
7         Database.executeBatch(batch, 200);
8
9     }
10
11 }
```

Apex Class

## SchedulePaymentReminderBatch

### Apex Class Detail

[Edit](#) [Delete](#) [Download](#) [Security](#) [Show Dependencies](#)

Name	SchedulePaymentReminderBatch	Status	Active
Namespace Prefix		Code Coverage	0% (0/3)
Created By	<a href="#">Kim Lois Sangil</a> , 7/13/2025, 6:58 AM	Last Modified By	<a href="#">Kim Lois Sangil</a> , 7/13/2025, 6:58 AM

[Class Body](#) [Class Summary](#) [Version Settings](#) [Trace Flags](#)

```
1 public class SchedulePaymentReminderBatch implements Schedulable {  
2     public void execute(SchedulableContext sc) {  
3         PaymentReminderBatch batch = new PaymentReminderBatch();  
4         Database.executeBatch(batch, 200);  
5     }  
6 }  
7  
8 }  
9 }  
10 }  
11 }
```

## Phase 3: UI/UX Development & Customization

### Milestone 13: The Lightning App

#### Activity 1: Create a Lightning App for “Tours & Travels CRM”

New Lightning App

#### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

##### App Details

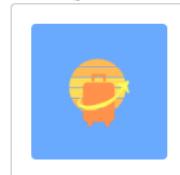
\* App Name ⓘ

\* Developer Name ⓘ

Description ⓘ

##### App Branding

Image ⓘ



Clear

Primary Color Hex

Value ⓘ  #0070D2

##### Org Theme Options

Use the app's image and color instead of the org's custom theme

#### App Launcher Preview



## New Lightning App

### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

C Create ▾

X

▶ ◀

Selected Items

<span style="color: red;">█</span>	Customers Info
<span style="color: teal;">█</span>	Travel Packages
<span style="color: blue;">█</span>	Bookings
<span style="color: green;">█</span>	Booking Payments
<span style="color: orange;">█</span>	Booking Guests
<span style="color: pink;">█</span>	Employees
<span style="color: lightgreen;">█</span>	Feedbacks
<span style="color: lightblue;">█</span>	Tasks
<span style="color: lightteal;">█</span>	Reports
<span style="color: lightpurple;">█</span>	Dashboards

▲ ▼

### User Profiles

Choose the user profiles that can access this app.

#### Available Profiles

Available Profiles

🔍  X

Salesforce API Only System Integrations

X

#### Selected Profiles

Selected Profiles

System Administrator
----------------------

# Milestone 14: Editing of Page Layouts

## Activity 1: To edit a Page Layout in Customer Info Object

SETUP > OBJECT MANAGER  
**Customer Info**

**Customer Info Layout**

Save ▾ Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

Section	Country	Date of Birth	Phone
Blank Space	Created By	Email	
Age	Customer ID	Last Modified By	
City	Customer Name	Owner	

**Customer Info Sample**

**Highlights Panel**  
Customize the highlights panel for this page layout...

**Quick Actions in the Salesforce Classic**  
Publisher [\[i\]](#)

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

**Salesforce Mobile and Lightning Experience**  
Actions [\[i\]](#)

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

**Customer Info Detail**

Standard Buttons: [Edit](#) [Delete](#) [Clone](#) [Change Owner](#) [Change Record Type](#) [Printable View](#) [Sharing](#) [Sharing Hierarchy](#) [Edit Labels](#)

Custom Buttons: [\[button\]](#)

Information (Header visible on edit only)

Customer ID	GEN-2004-001234	Date of Birth	7/13/2025
Customer Name	Sample Text	Age	18.662
Email	sarah.sample@company.com	Owner	<a href="#">Sample Text</a>
Phone	1-415-555-1212		
Country	Sample Text		
City	Sample Text		

## Activity 2: To edit a Page Layout in BookingGuest Object

SETUP > OBJECT MANAGER

**Booking Guest**

**Page Layouts**

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

**Booking Guest Layout ▾**

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

Section	Booking	Created By	Relation with Cus...
Blank Space	Booking Guest Name	Gender	Special Needs
Age	City	Last Modified By	Visa Required
Age Category	Country	Passport Number	

**Booking Guest Sample**

**Highlights Panel**

Customize the highlights panel for this page layout...

**Quick Actions in the Salesforce Classic Publisher**

Actions in this section are currently inherited from the global publisher layout. You can [override the global publisher layout](#) to set a customized list of actions for the publisher on pages that use this layout.

**Salesforce Mobile and Lightning Experience Actions**

Actions in this section are predefined by Salesforce. You can [override the predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

**Booking Guest Detail**

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Printable View Edit Labels Custom Buttons

Information (Header visible on edit only)	
★ Booking	Sample Text
★ Booking Guest Name	Sample Text
★ Age	835
Gender	Sample Text
Relation with Customer	Sample Text
Age Category	Sample Text
Special Needs	Sample Text
★ Country	Sample Text
City	Sample Text
Passport Number	Sample Text
Visa Required	✓

## Activity 3: To edit a Page Layout in TravelPackage Object

SETUP > OBJECT MANAGER

**Travel Package**

**Page Layouts**

Fields & Relationships

Details

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Report Charts

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

Section	Average Rating	Guide Included	Maximum Group Size	Package Type	Region
Blank Space	Country	Guide Languages	Meals Included	Places Covered	Transportation Modes
Additional Notes	Created By	Insurance Included	Membership	Preferred Guide L...	Travel Package Name
Availability Status	Duration in Days	Last Modified By	Owner	Price Per Person	Visa Assistance

Information (Header visible on edit only)

Travel Package Name	Sample Text	Country	Sample Text
Region	Sample Text	Places Covered	Sample Text
Duration in Days	108	Price Per Person	\$123.45
Package Type	Sample Text	Membership	Sample Text
Transportation Modes	Sample Text	Owner	Sample Text
Availability Status	Sample Text	Visa Assistance	
Average Rating	16.9	✓	
Meals Included	Sample Text	✓	

Additional Information

Insurance Included	✓	Visa Assistance	✓
Guide Included	✓		
Preferred Guide Language	Sample Text		
Additional Notes	Sample Text		

System Information (Header visible on edit only)

## Activity 4: To edit a Page Layout in Employee Object

SETUP > OBJECT MANAGER

**Employee**

**Page Layouts**

Fields & Relationships

Details

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

**Fields**

Section	Availability Status	Department	Employment Type	Last Modified By	Role
Blank Space	City	Email	Guide Role Assigned	Owner	Salary
Address	Country	Employee ID	Joining Date	Phone	
Assigned Region	Created By	Employee Name	Languages Spoken	Profile Picture	

Information (Header visible on edit only)

Employee ID	GEN-2004-001234	Profile Picture	Sample Text
Employee Name	sarah.sample@company.com	Owner	Sample Text
Email	sarah.sample@company.com		
Phone	1-415-555-1212		
Role	Sample Text		
Department	Sample Text		
Employment Type	Sample Text		
Salary	\$123.45		
Joining Date	7/13/2025		
Availability Status	Sample Text		
Languages Spoken	Sample Text		
Assigned Region	Sample Text		

Address Details

Country	Sample Text	Address	Sample Text
City	Sample Text		

System Information (Header visible on edit only)

Created By	Sample Text	Last Modified By	Sample Text
------------	-------------	------------------	-------------

## Activity 5: To edit a Page Layout in Booking Object

SETUP > OBJECT MANAGER  
Booking

**Page Layouts**

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

Fields

Section	Booking Date	Cancel Confirmation	Customer	Last Modified By	Owner	Require T...
Blank Space	Booking Name	Cancellation Date	Customer Email	Membership	Preferred Accommo...	Require V...
	Accommodation Amou...	Cancellation Reason	Guide Assigned	No of Booking Gue...	Preferred Guide...	Total Acco...
	Approval Status	Booking Status	Created By	Include Travel In...	Preferred Guide L...	Total Bal...

Information (Header visible on edit only)

Booking Number	GEN-2004-001234	Number of Travelers	947
Customer	Sample Text	Booking Status	Sample Text
Customer Email	sarah.sample@company.com	Approval Status	Sample Text
Travel Package	Sample Text	Cancellation Date	7/13/2025
Booking Date	7/13/2025	Cancel Confirmation	✓
Travelling Start Date	7/13/2025	Travel Cost Per Person	\$123.45
Travelling End Date	7/13/2025	Total Travel Amount	\$123.45
Trip Type	Sample Text	Accommodation Amount per Person per Day	\$123.45
Membership	Sample Text	Cancellation Reason	Sample Text
Preferred Accommodation	Sample Text	Total Accommodation Amount	\$123.45
Include Travel Insurance	✓	Total Billing Amount	\$123.45
Require Visa Assistance	✓	Owner	Sample Text
Require Tour Guide	✓		
Guide Assigned	Sample Text		
Preferred Guide Language	Sample Text		
No of Booking Guests	77,249		
Info Available			

## Activity 6: To edit a Page Layout in Booking Payments Object

SETUP > OBJECT MANAGER  
Booking Payment

**Page Layouts**

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

Fields

Section	Customer Name	Payment Date	Payment Number	Total Bill Amount
Blank Space	Last Modified By	Payment Method	Payment Receipt Sent	
Booking	Notes	Payment Mode Details	Payment Reference...	
	Created By	Payment Name	Payment Status	

Salesforce Mobile and Lightning Experience

**Actions**

Actions in this section are predefined by Salesforce. You can override the [predefined actions](#) to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

**Booking Payment Detail**

Standard Buttons
Edit   Delete   Clone   Change Owner   Change Record Type   Printable View   Sharing   Sharing Hierarchy   Edit Labels
Custom Buttons

Information (Header visible on edit only)

Payment Number	GEN-2004-001234	Payment Method	Sample Text
Customer Name	Sample Text	Payment Reference Number	Sample Text
Booking	Sample Text	Payment Mode Details	Sample Text
Payment Date	7/13/2025	Payment Receipt Sent	✓
Total Bill Amount	\$123.45	Owner	Sample Text
Payment Status	Sample Text		
Notes	Sample Text		

## Activity 7: To edit a Page Layout in Feedbacks Object

SETUP > OBJECT MANAGER

**Feedback**

**Page Layouts**

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

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields Quick Find Field Name

Section	Created By	Feedback No	Package Satisfaction	Transport Rating
Blank Space	Customer Info	Last Modified By	Response Status	Suggestions / Com...
Accommodation Rating	Feedback Date	Overall Rating	Owner	Tour Guide Rating
Booking	Feedback Name			

**Salesforce Mobile and Lightning Experience**

**Actions**

Actions in this section are predefined by Salesforce. You can **override the predefined actions** to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

**Feedback Detail**

Standard Buttons Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Edit Labels

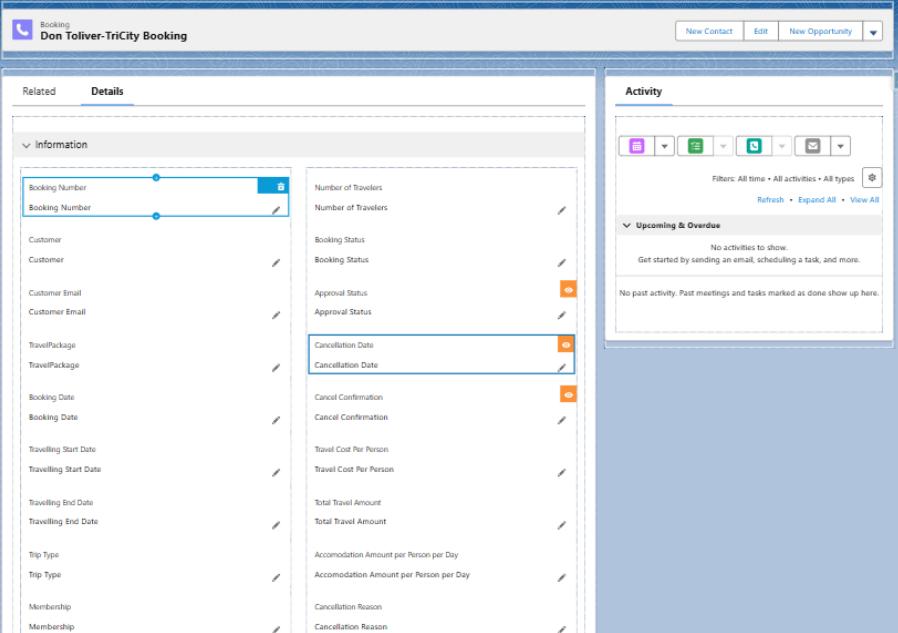
Custom Buttons

Information (Header visible on edit only)

Feedback No	GEN-2004-001234	Overall Rating	Sample Text
Customer Info	Sample Text	Tour Guide Rating	Sample Text
Booking	Sample Text	Transport Rating	Sample Text
Feedback Date	7/13/2025	Accommodation Rating	Sample Text
Feedback Name	Sample Text	Owner	Sample Text
Package Satisfaction	Sample Text		
Response Status	Sample Text		
Suggestions / Comments	Sample Text		

# Milestone 15: Dynamic Forms

## Activity 1: To create a Dynamic Form in Booking Object



The screenshot shows the 'Booking' object's dynamic form configuration. The 'Information' section contains fields like Booking Number, Customer, Customer Email, TravelPackage, Booking Date, Travelling Start Date, Travelling End Date, Trip Type, Membership, and Preferred Accommodation. The 'Activity' section shows a list of upcoming and overdue tasks, with 'Cancellation Date' highlighted.

Page > Cancellation Date

Object: Booking  
API Name: Cancellation\_Date\_\_c

UI Behavior:  None  Read-Only  Required

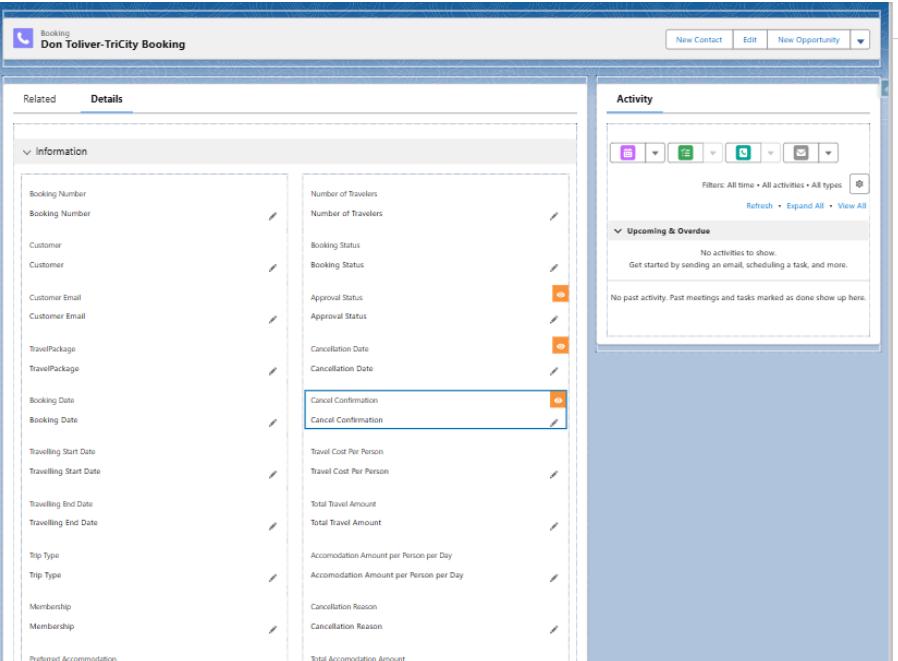
Conditional Formatting: Select a ruleset...

Set Field Visibility

Filters:

- Record > Booking Status Equal Cancelled

+ Add Filter



The screenshot shows the 'Booking' object's dynamic form configuration for 'Cancel Confirmation'. It includes the same set of fields as the first configuration. The 'Activity' section shows a list of tasks, with 'Cancel Confirmation' highlighted.

Page > Cancel Confirmation

Object: Booking  
API Name: Cancel\_Confirmation\_\_c

UI Behavior:  None  Read-Only  Required

Conditional Formatting: Select a ruleset...

Set Field Visibility

Filters:

- Record > Booking Status Equal Cancelled

+ Add Filter

The screenshot shows a Salesforce page titled "Approval Status". On the left, there is a vertical list of fields with edit icons next to them. The fields listed are:

- Number of Travelers
- Booking Status
- Approval Status
- Cancellation Date
- Cancel Confirmation
- Travel Cost Per Person
- Travel Amount
- Accommodation Amount per Person per Day
- Cancellation Reason

On the right, there is an "Activity" feed section with a header bar containing "New Contact", "Edit", "New Opportunity", and a dropdown menu. Below the header is a toolbar with various icons. The main area shows a message: "No activities to show. Get started by sending an email, scheduling a task, and more." At the bottom, it says "No past activity. Past meetings and tasks marked as done show up here."

Page > Approval Status

Object

Booking

API Name

Approval\_Status\_\_c

UI Behavior

- None
- Read-Only
- Required

Conditional Formatting i

Select a ruleset...

[View All Rulesets](#)

v Set Field Visibility

Filters

1 Record > Booking Status Equal X  
Cancelled

[+ Add Filter](#)

**ORG DEFAULT**

APP DEFAULT

APP, RECORD

This page is set as org default for **desktop and phone** form factors.

## Milestone 16: Users

## **Activity 1: Create User**

**SETUP**

 **Users**

## ***Activity 2: Creating other users***

User
[Setup](#)

## Users

Sean Pablo

[Permission Set Assignments \[0\]](#)
[Permission Set Assignments: Activation Required \[0\]](#)
[Permission Set Group Assignments \[0\]](#)
[Permission Set License Assignments \[0\]](#)
[Personal Queue Membership \[0\]](#)
[Team \[0\]](#)
[Managers in the Role Hierarchy \[1\]](#)
[OAuth Apps \[0\]](#)
[Third-Party Account Links \[0\]](#)
[Built-in Authenticators \[0\]](#)
[Installed Mobile Apps \[0\]](#)
[All](#)

[Login History \[0+\]](#)
[User Provisioning Accounts \[0\]](#)

User Detail

[Edit](#)
[Sharing](#)
[Reset Password](#)
[Freeze](#)
[View Summary](#)

Name	Sean Pablo	Role	Travel Agent
Alias	spabl	User License	Salesforce Platform
Email	dolphin24@gmail.com <a href="#">[Verify]</a> <span style="color: blue;">i</span>	Profile	Travel Agent
Username	spabl@capstone.com	Active	<input checked="" type="checkbox"/>
Nickname	Sean <span style="color: blue;">i</span>	Marketing User	<input type="checkbox"/>

User	
<b>Ben Kadow</b>	
<a href="#">Permission Set Assignments [0]</a>	<a href="#">Permission Set Assignments: Activation Required [0]</a>
<a href="#">Permission Set Group Assignments [0]</a>	<a href="#">Permission Set License Assignments [0]</a>
<a href="#">Queue Membership [0]</a>	<a href="#">Team [0]</a>
<a href="#">Managers in the Role Hierarchy [1]</a>	<a href="#">OAuth Apps [0]</a>
	<a href="#">Third-Party Account Links [0]</a>
	<a href="#">Built-in Authenticators [0]</a>
	<a href="#">Installed Mobile Apps [0]</a>
	<a href="#">Login History [0+]</a>
	<a href="#">User Provisioning Accounts [0]</a>
User Detail	
	<a href="#">Edit</a> <a href="#">Sharing</a> <a href="#">Reset Password</a> <a href="#">Freeze</a> <a href="#">View Summary</a>
Name	Ben Kadow
Alias	bkadow
Email	<a href="mailto:loissangil@gmail.com">loissangil@gmail.com</a> <a href="#">[Verify]</a> <a href="#">i</a>
Username	bkadow@capstone.com
Nickname	Ben <a href="#">i</a>
Role	<a href="#">Travel Agent</a>
User License	<a href="#">Salesforce Platform</a>
Profile	<a href="#">Travel Agent</a>
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>

## Milestone 17: Reports

### Activity 1: Create a Report Folder

The screenshot shows the 'Reports' section of the Tours & Travels CRM. At the top, there is a blue header bar with a yellow circular icon containing a question mark. Below it, the main navigation bar includes a grid icon, the text 'Tours & Travels CRM', and a 'Customers' link. The main content area is titled 'Reports' and shows the path 'All Folders > Revenue Folder'. It indicates '0 items'. There are two tabs: 'REPORTS' (which is selected) and 'Recent'. The background features a faint map of the world.

### Activity 2: Sharing a Report Folder

The screenshot shows the 'Share folder' dialog box. At the top, it displays 'Automated Process' and the date '7/3/2025 6:11 PM'. The main title is 'Share folder'. A note says 'These sharing settings apply to all subfolders in this folder.' Under 'Share With', a dropdown menu is set to 'Users'. Below that, there is a search bar for 'Names' with a placeholder 'Search Users...' and an 'Access' dropdown set to 'View'. A large 'Share' button is present. A section titled 'Who Can Access' is expanded, showing a search bar and a list of users/roles with their access levels. The list includes:

User/Role	Access Level
Kim Lois Sangil Users	Manage
Finance Officer Roles	View
Travel Agent Manager	View

A 'Done' button is located at the bottom right of the dialog.

## Activity 3: Create Report

Screenshot of the Tours & Travels CRM interface showing the creation of a Monthly Revenue Report.

**Report Overview:**

- Title:** Monthly Revenue Report
- Category:** Bookings
- Preview Message:** Previewing a limited number of records. Run the report to see everything.
- Chart:** Sum of Total Billing Amount (40K)
- Filters:**
  - Groups: TravelPackage, Revenue Category
  - Columns: Booking Number, Customer, Booking Date, # Total Billing Amount
- Report Data:**

TravelPackage	Revenue Category	Booking Number	Customer	Booking Date	Total Billing Amount
Basic Philippines Package (1)	Medium (1)	BK-0021	Nina Tan	7/1/2025	\$11,000.00
	Subtotal				\$11,000.00
Desert Discovery (1)	Medium (1)	BK-0022	Luis Manalo	7/10/2025	\$28,500.00
	Subtotal				\$28,500.00
	Total (2)				\$39,500.00

**Reports Section:**

- Folder:** All Folders > Revenue Folder
- Search:** Search all folders...
- Recent Reports:**
  - Monthly Revenue Report (Created by Me, Kim Lois Sangil, 7/14/2025, 12:13 AM)

Report: Booking Payments with Booking Pending Payments

Total Records 22 Total Total Bill Amount \$299,900.00

Enable Field Editing

	Payment Number	Booking: Booking Number	Customer Name	Booking: Booking Date	Total Bill Amount	Payment Method	Payment Status
1	PNUM-0000000011	BK-0012	Don Toliver	7/13/2025	\$6,400.00	-	Pending
2	PNUM-0000000016	BK-0017	Bella Torres	6/5/2025	\$30,000.00	-	Pending
3	PNUM-0000000013	BK-0014	Sarah Cruz	7/13/2025	\$30,000.00	-	Pending
4	PNUM-0000000022	BK-0023	Francis Yu	7/1/2025	\$13,000.00	-	Pending
5	PNUM-0000000020	BK-0021	Nina Tan	7/1/2025	\$11,000.00	-	Pending
6	PNUM-0000000027	BK-0021	Nina Tan	7/1/2025	\$11,000.00	Debit Card	Pending
7	PNUM-0000000019	BK-0020	James Lim	7/13/2025	\$26,000.00	-	Pending
8	PNUM-0000000017	BK-0018	Mike Dela Fuente	10/20/2001	\$55,000.00	-	Pending
9	PNUM-0000000021	BK-0022	Luis Manalo	7/10/2025	\$28,500.00	-	Pending
10	PNUM-0000000018	BK-0019	Carla Reyes	7/13/2025	\$19,000.00	-	Pending
11	PNUM-0000000026	BK-0019	Carla Reyes	7/13/2025	\$19,000.00	Net Banking	Pending
12	PNUM-0000000012	BK-0013	John Smith	7/13/2025	\$19,000.00	-	Pending
13	PNUM-0000000014	BK-0015	Alex Gomez	7/11/2025	\$32,000.00	-	Pending
14	PNUM-0000000002	BK-0002		-	\$0.00	-	Pending
15	PNUM-0000000009	BK-0009		-	\$0.00	-	Pending
16	PNUM-0000000004	BK-0003	Clarissee Cench	-	\$0.00	-	Pending
17	PNUM-0000000003	BK-0004	Clarissee Cench	-	\$0.00	-	Pending
18	PNUM-0000000007	BK-0007	Clarissee Cench	-	\$0.00	-	Pending
19	PNUM-0000000008	BK-0008	Clarissee Cench	-	\$0.00	-	Pending
20	PNUM-0000000001	BK-0001	Jacques Smitch	-	\$0.00	-	Pending
21	PNUM-0000000005	BK-0005	Jacques Smitch	-	\$0.00	-	Pending
22	PNUM-0000000006	BK-0006	Jacques Smitch	-	\$0.00	-	Pending
23					\$299,900.00		

**Report: Bookings with TravelPackage  
Top Travel Packages**

Total Records: 11 Total Total Billing Amount: \$269,900.00

**Top Travel Packages by Booking Count**

Travel Package Name	Record Count
Basic Philippines Package	4
Desert Discovery	3
(VIP) Premium India Package	2
Tri-City Package	1
Mid Thai Adventure	1

TravelPackage: Travel Package Name ↴  Booking Number  Booking Date  Total Billing Amount

<input type="checkbox"/> Basic Philippines Package (4)	BK-0020	7/13/2025	\$26,000.00
	BK-0018	10/20/2001	\$55,000.00
	BK-0021	7/1/2025	\$11,000.00
	BK-0023	7/1/2025	\$13,000.00
<b>Subtotal</b>			\$105,000.00
<input type="checkbox"/> Desert Discovery (3)	BK-0013	7/13/2025	\$19,000.00
	BK-0019	7/13/2025	\$19,000.00
	BK-0022	7/10/2025	\$28,500.00
<b>Subtotal</b>			\$66,500.00
<input type="checkbox"/> (VIP) Premium India Package (2)	BK-0014	7/13/2025	\$30,000.00
	BK-0017	6/5/2025	\$30,000.00
<b>Subtotal</b>			\$60,000.00
<input type="checkbox"/> Tri-City Package (1)	BK-0012	7/13/2025	\$6,400.00
<b>Subtotal</b>			\$6,400.00
<input type="checkbox"/> Mid Thai Adventure (1)	BK-0015	7/11/2025	\$32,000.00
<b>Subtotal</b>			\$32,000.00
<b>Total (11)</b>			\$269,900.00

**Report: Employees  
Employee Role Breakdown**

Total Records: 4

**Employee Role Breakdown**

Role	Record Count
Travel Agent	2
Manager	1
Admin	1

Role ↴  Employee: Employee Name

<input type="checkbox"/> Travel Agent (2)	Sean Pablo
	Ben Kadow
<b>Subtotal</b>	
<input type="checkbox"/> Manager (1)	Michael Jackson
<b>Subtotal</b>	
<input type="checkbox"/> Admin (1)	Kim Lois Sangil
<b>Subtotal</b>	
<b>Total (4)</b>	

## Milestone 18: Dashboards

### Activity 1: Create Dashboard

The screenshot shows the Tours & Travels CRM interface with a focus on dashboard creation. At the top, there's a navigation bar with links like 'Tours & Travels CRM', 'Dashboards', 'Customers Info', 'Travel Packages', 'Bookings', 'Booking Payments', 'Booking Guests', and 'Employees'. A search bar is also present. Below the navigation, a modal window titled 'Tours & Travels DashBoard' displays a donut chart titled 'Monthly Revenue Report' showing 'Total payments completed Bookings'. The chart indicates a sum of \$79k. To the right of the chart, there's a legend for 'TravelPackage' with three items: 'Basic Philippines Package' (blue circle), 'Desert Discovery' (blue circle), and 'TravelPackage' (grey circle). A green success message 'Dashboard saved' with a checkmark is overlaid on the dashboard area. On the far right, there's a grid of empty dashboard slots and a button labeled '+ Widget'.

## Activity 2: Add other Components in the Dashboard

Tours & Travels CRM Dashboards Customers Info Travel Packages Bookings Booking Payments Booking Guests Employees

Tours & Travels DashBoard + Widget +

**Monthly Revenue Report**  
Total payments completed Bookings

Sum of Total Billing Amount

\$29k \$79k \$50k

TravelPackage  
Basic Philippines Package  
Desert Discovery

[View Report \(Monthly Revenue Report\)](#)

**Top Travel Packages**

Sum of Total Billing Amount

Travel Package Name	Sum of Total Billing Amount
(VIP) Premium India Pac...	\$60k
Basic Philippines Package	\$105k
Desert Discovery	\$67k
Mid Thai Adventure	\$32k
Tri-City Package	\$6.4k

[View Report \(Top Travel Packages\)](#)

**Pending Payments**

Payment ID	Booking: Bookin...	Custom...	Booking: Bo...	Total B...
PNUM-0000000001	BK-0001	Jacques Smith	-	\$0.00
PNUM-0000000002	BK-0002		-	\$0.00
PNUM-0000000003	BK-0004	Clarisse Cench	-	\$0.00
PNUM-0000000004	BK-0003	Clarisse Cench	-	\$0.00
PNUM-0000000005	BK-0005	Jacques Smith	-	\$0.00

[View Report \(Pending Payments\)](#)

**Employee Role Breakdown**

Record Count

Role	Record Count
Travel Agent	2
Manager	1
Admin	1

[View Report \(Employee Role Breakdown\)](#)

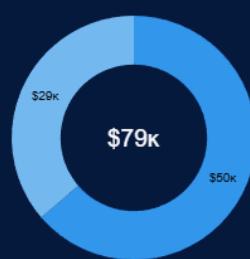
## Activity 3: View Dashboard

 Tours & Travels CRM Dashboards Customers Info Travel Packages Bookings Booking Payments Booking Gues

Search... 

Dashboard Tours & Travels DashBoard As of Jul 14, 2025, 1:10 AM · Viewing as Kim Lois Sangil

**Monthly Revenue Report**  
Total payments completed Bookings



Sum of Total Billing Amount

TravelPackage  
Basic Philippines Package  
Desert Discovery

[View Report \(Monthly Revenue Report\)](#) As of Jul 14, 2025, 1:10 AM

**Top Travel Packages**

Sum of Total Billing Amount

Travel Package Name	Sum of Total Billing Amount
(VIP) Premium India Pack...	\$60k
Basic Philippines Package	\$105k
Desert Discovery	\$67k
Mid Thai Adventure	\$32k
Tri-City Package	\$6.4k

[View Report \(Top Travel Packages\)](#) As of Jul 14, 2025, 1:10 AM

**Pending Payments**

Payment N...	Booking: Bookin...	Custom...	Booking: Boo...	Total Bi...
PNUM-0000000001	BK-0001	Jacques Smitch	-	\$0.00
PNUM-0000000002	BK-0002		-	\$0.00
PNUM-0000000003	BK-0004	Clarisse Cench	-	\$0.00
PNUM-0000000004	BK-0003	Clarisse Cench	-	\$0.00
PNUM-0000000005	BK-0005	Jacques Smitch	-	\$0.00

[View Report \(Pending Payments\)](#) As of Jul 14, 2025, 1:10 AM

**Employee Role Breakdown**

Record Count

Role	Record Count
Travel Agent	2
Manager	1
Admin	1

[View Report \(Employee Role Breakdown\)](#) As of Jul 14, 2025, 1:10 AM

## Activity 4: Create another 2 Dashboards

 Tours & Travels CRM Dashboards Customers Info Travel Packages Bookings Booking Payments Booking C

 Dashboard **Bookings & Packages**  
As of Jul 14, 2025, 1:13 AM · Viewing as Kim Lois Sangil

**Top Travel Packages**

Name	Sum of Total Billing Amount
(VIP) Premium India Pack...	\$60k
Basic Philippines Package	\$105k
Desert Discovery	\$67k
Mid Thai Adventure	\$32k
Tri-City Package	\$6.4k

[View Report \(Top Travel Packages\)](#) As of Jul 14, 2025, 1:13 AM

**Monthly Revenue Report**

Revenue Category	Sum of Total Billing Amount
Basic P... Medium	\$50k
Desert ... Medium	\$29k

[View Report \(Monthly Revenue Report\)](#) As of Jul 14, 2025, 1:13 AM

 Tours & Travels CRM Dashboards Customers Info Travel Packages Bookings Booking Payments Booking Guests Employees Feedbacks More

 Dashboard **Pending Payments**  
As of Jul 14, 2025, 1:14 AM · Viewing as Kim Lois Sangil

**Employee Role Breakdown**

Role	Record Count
Travel Agent	2
Manager	1
Admin	1

[View Report \(Employee Role Breakdown\)](#) As of Jul 14, 2025, 1:14 AM

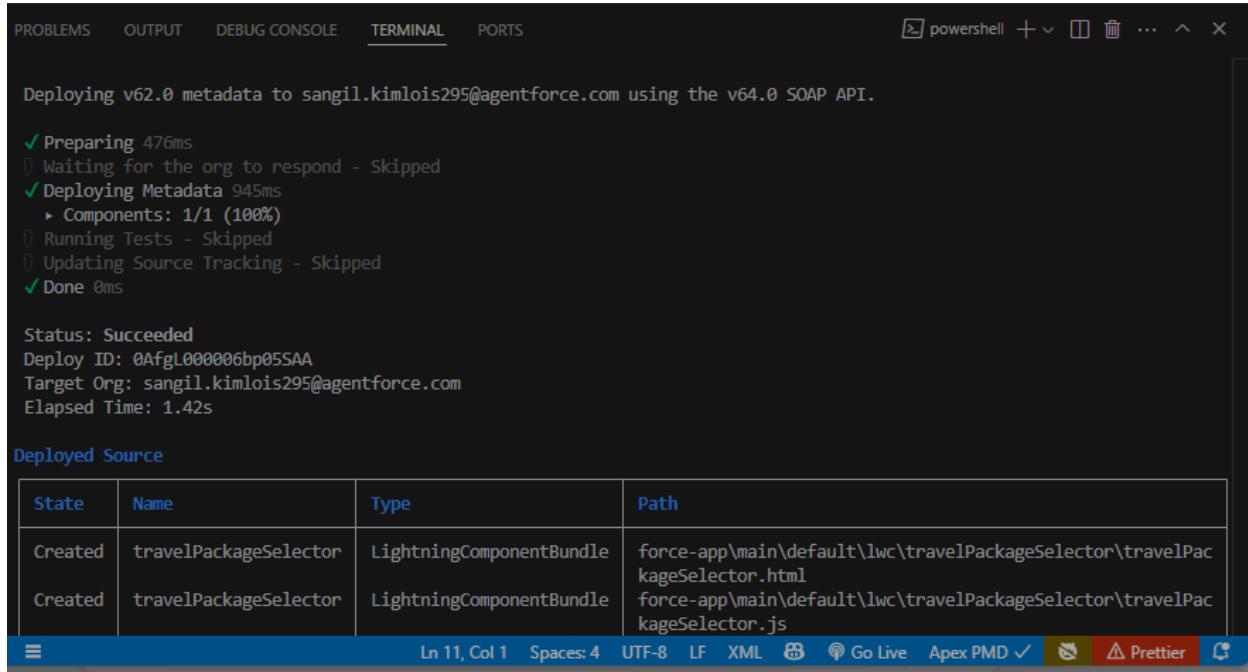
**Pending Payments**

Payment ID	Booking Ref.	Customer Name	Booking Status	Total Bill.
PNUM-0000000001	BK-0001	Jacques Smith	-	\$0.00
PNUM-0000000002	BK-0002		-	\$0.00
PNUM-0000000003	BK-0004	Clarisse Cench	-	\$0.00
PNUM-0000000004	BK-0003	Clarisse Cench	-	\$0.00
PNUM-0000000005	BK-0005	Jacques Smith	-	\$0.00

[View Report \(Pending Payments\)](#) As of Jul 14, 2025, 1:14 AM

## Milestone 19: Lightning Web Component Creation

### Activity 1: Create Lightning Web Component Creation Deployment Success Terminal:



The screenshot shows the VS Code interface with the 'TERMINAL' tab selected. The terminal window displays the output of a deployment command using the v64.0 SOAP API. The status message indicates a successful deployment with a Deploy ID of 0AfgL000006bp05SAA to the target org sangil.kimlois295@agentforce.com. The deployment took 1.42s. A table titled 'Deployed Source' lists two components: 'travelPackageSelector' (LightningComponentBundle) located at force-app/main/default/lwc/travelPackageSelector/travelPackageSelector.html and force-app/main/default/lwc/travelPackageSelector/travelPackageSelector.js, both in a 'Created' state.

State	Name	Type	Path
Created	travelPackageSelector	LightningComponentBundle	force-app\main\default\lwc\travelPackageSelector\travelPackageSelector.html
Created	travelPackageSelector	LightningComponentBundle	force-app\main\default\lwc\travelPackageSelector\travelPackageSelector.js

### travelPackageSelector.html:

```
<template>

    <lightning-card title="Travel Packages">

        <div class="slds-p-around_medium">

            <lightning-combobox

                name="country"

                label="Select Country"

                value={selectedCountry}

                placeholder="Choose a country"

                options={countryOptions}

                onchange={handleCountryChange}>

        </lightning-combobox>
```

```

<template if:true={packages}>

    <template for:each={packages} for:item="pkg">

        <div key={pkg.Id} class="slds-box slds-m-top_small">

            <p><b>Package Name:</b> {pkg.Name}</p>

            <p><b>Package Type:</b> {pkg.Package_Type__c}</p>

            <p><b>Duration in Days:</b>
{pkg.Duration_in_Days__c}</p>

            <p><b>Guide Facility:</b>
{pkg.Guide_Included__c}</p>

            <p><b>Places Covered:</b>
{pkg.Places_Covered__c}</p>

            <p><b>Membership:</b> {pkg.Membership__c}</p>

            <p><b>Region:</b> {pkg.Region__c}</p>

            <p><b>Transportation Mode:</b>
{pkg.Transportation_Modes__c}</p>

            <p><b>Availability Status:</b>
{pkg.Availability_Status__c}</p>

            <p><b>Average Rating:</b>
{pkg.Average_Rating__c}</p>

        </div>

    </template>

</template>

<template if:true={error}>

    <p class="slds-text-color_error">{error}</p>

</template>

```

```
</div>

</lightning-card>

</template>
```

### ***travelPackageSelector.js:***

```
import { LightningElement, track } from 'lwc';

import getPackagesByCountry from
'@salesforce/apex/TravelPackageController.getPackagesByCountry';

export default class TravelPackageSelector extends LightningElement {

    @track selectedCountry = '';
    @track packages = [];
    @track error;

    get countryOptions() {
        return [
            { label: 'India', value: 'India' },
            { label: 'France', value: 'France' },
            { label: 'Philippines', value: 'Philippines' },
            { label: 'USA', value: 'USA' },
            { label: 'Saudi Arabia', value: 'Saudi Arabia' },
            { label: 'Switzerland', value: 'Switzerland' },
            { label: 'Thailand', value: 'Thailand' },
            { label: 'Maldives', value: 'Maldives' },
        ];
    }

    handleCountryChange(event) {
        const selectedCountry = event.target.value;
        this.selectedCountry = selectedCountry;
        this.getPackages();
    }

    getPackages() {
        const selectedCountry = this.selectedCountry;
        if (!selectedCountry) {
            this.error = 'Please select a country';
            return;
        }
        this.error = '';
        const packagesPromise = getPackagesByCountry(selectedCountry);
        packagesPromise.then((packages) => {
            this.packages = packages;
        }).catch((error) => {
            this.error = `Error fetching packages for ${selectedCountry}: ${error.message}`;
        });
    }
}
```

```

        { label: 'Dubai', value: 'Dubai' },
        { label: 'Sri Lanka', value: 'Sri Lanka' },
        { label: 'Bangkok', value: 'Bangkok' },
        { label: 'Singapore', value: 'Singapore' },
        { label: 'Myanmar', value: 'Myanmar' },
        { label: 'Nepal', value: 'Nepal' }

    ];
}

handleCountryChange(event) {
    this.selectedCountry = event.detail.value;
    this.packages = [];
    this.error = undefined;

    getPackagesByCountry({ country: this.selectedCountry })
        .then(result => {
            this.packages = result;
        })
        .catch(error => {
            this.error = error.body.message;
        });
}
}

```

### ***travelPackageSelector.js:***

```
<?xml version="1.0" encoding="UTF-8"?>

<LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">

    <apiVersion>62.0</apiVersion>

    <isExposed>true</isExposed>

    <targets>

        <target>lightning__AppPage</target>

        <target>lightning__HomePage</target>

        <target>lightning__RecordPage</target>

    </targets>

</LightningComponentBundle>
```

# Milestone 20: Lightning App Page Creation

## Activity 1: Adding the Lightning Component to the App Page

The screenshot shows the Lightning App Builder interface. At the top, the title bar reads "Lightning App Builder" and "Pages". The main area is titled "Travel Package Selector". On the left, the "Components" sidebar lists various standard components like Accordion, Chatter Feed, and Dashboard. Under "Standard (25)", the "Travel Packages" component is selected and displayed in a preview window. The preview window has a header "Activation: Travel Package Selector" and tabs for "PAGE SETTINGS", "LIGHTNING EXPERIENCE" (which is selected), and "MOBILE NAVIGATION". The "Add to Lightning Apps" section shows a list of apps, and "Tours & Travels CRM" is selected. To the right, a "Filters" section with a "Set Component Visibility" dropdown is visible. Below the preview window, the main workspace shows the "Travel Packages" component integrated into an app page. The app page header includes "Tours & Travels CRM" and "Travel Package Selector". The main content area displays the "Travel Packages" component with a "Select Country" dropdown menu.

## Phase 4: Data Migration, Testing & Security

### Milestone 21: Duplicate and Matching rules

**Activity 1: Create Field History Tracking on Tours & Travels CRM objects on certain fields to track and show the field history in the History related list of an object**

SETUP

#### Field History Tracking

This page allows you to select the fields you want to track on an object. Whenever a user modifies any of the selected fields, the old and new field values are added to the History related list, including the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.

Q: b   Show only tracked objects

Object	Number of Tracked Fields	Action
Booking	3	<a href="#">View</a>
Booking Guest		<a href="#">View</a>
Booking Payment		<a href="#">View</a>
Buyer Group		<a href="#">View</a>
Communication Subscription		<a href="#">View</a>
Communication Subscription...		<a href="#">View</a>
Communication Subscription...		<a href="#">View</a>
Communication Subscription...		<a href="#">View</a>
Data Use Legal Basis		<a href="#">View</a>
Feedback		<a href="#">View</a>
Object Milestone		<a href="#">View</a>
Price Book		<a href="#">View</a>
Price Book Entry		<a href="#">View</a>
Privacy RTBF Request		<a href="#">View</a>
Problem		<a href="#">View</a>
Problem Related Item		<a href="#">View</a>
Promotion Segment Buyer G...		<a href="#">View</a>
Related Problem and Incident		<a href="#">View</a>
Resource Absence		<a href="#">View</a>

Booking

Enable Booking History

[Deselect all fields](#)

**Track old and new values**

Owner  
 Booking Name  
 Customer  
 Guide Assigned  
 Travelling Start Date  
 TravelPackage  
 Number of Travelers  
 Preferred Accommodation  
 Trip Type  
 Membership  
 Booking Status  
 Preferred Guide Language  
 Cancel Confirmation  
 Approval Status  
 Customer Email  
 Include Travel Insurance  
 Require Visa Assistance  
 Require Tour Guide  
 Preferred Guide  
 Booking Date  
 Cancellation Date

**Track changes only**

Cancellation Reason

[Cancel](#) [Save](#)



SETUP

## Field History Tracking

This page allows you to select the fields you want to track on an object. Whenever a user modifies any of the selected fields, the old and new field values are added to the History related list, including the date, time, nature of the change, and user making the change. Note that multi-select picklist and large text field values are tracked as edited; their old and new field values are not recorded.

 trav X Show only tracked objects

Object	Number of Tracked Fields	View
Travel Package	2	<a href="#">View</a>

[View Tracked Fields](#)

Page 1/1

< PreviousNext >

### Travel Package

 Enable Travel Package History[Deselect all fields](#)

#### Track old and new values

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

#### Track changes only

- Membership
- Package Type
- Transportation Modes
- Guide Languages

[Cancel](#)[Save](#)

## Milestone 22: Duplicate and Matching rules

### Activity 1: Create a Custom Matching Rule

Matching Rule  
Unique Email and Phone Number Combination

Matching Rule Detail		<a href="#">Delete</a>	<a href="#">Clone</a>	<a href="#">Deactivate</a>
Object	Customer Info			
Rule Name	Unique Email and Phone Number Combination			
Unique Name	Unique_Email_and_Phone_Number_Combination			
Description				
Matching Criteria	(Customer Info: Email EXACT MatchBlank = TRUE) AND (Customer Info: Phone EXACT MatchBlank = TRUE)			
Status	Active			
Created By	<a href="#">Kim Lois Sangi</a> , 7/14/2025, 2:17 AM			Modified By <a href="#">Kim Lois Sangi</a> , 7/14/2025, 2:17 AM

### Activity 2: Create a Duplicate Rule

Customer Info Duplicate Rule  
Unique Email and Phone [Help for this Page](#)

Duplicate Rule Detail		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>	<a href="#">Deactivate</a>
Rule Name	Unique Email and Phone				
Description					Order 1 of 1 [Reorder] <a href="#">i</a>
Object	Customer Info				
Record-Level Security	Enforce sharing rules				
Action On Create	Allow				Operations On Create <input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow				Operations On Edit <input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Alert Text	Email and Phone must be Unique				
Active	<input checked="" type="checkbox"/>				
Matching Rule	<input checked="" type="checkbox"/> Unique Email and Phone Number Combination <input checked="" type="checkbox"/> Mapped				Matching Criteria (Customer Info: Email EXACT MatchBlank = TRUE) AND (Customer Info: Phone EXACT MatchBlank = TRUE)
Conditions					
Created By	<a href="#">Kim Lois Sangi</a> , 7/14/2025, 2:21 AM				Modified By <a href="#">Kim Lois Sangi</a> , 7/14/2025, 2:21 AM

# Milestone 23: Profiles

## Activity 1: Travel Agent Profile Creation

**SETUP** Profiles

Profile Edit Travel Agent Help for this Page ?

Set the permissions and page layouts for this profile.

Profile Edit		Save	Save & New	Cancel																																								
Name	Travel Agent																																											
User License	Salesforce Platform																																											
Description																																												
Custom Profile <input checked="" type="checkbox"/>																																												
<b>Custom App Settings</b> <span style="float: right;">! = Required information</span>																																												
Analytics Studio (standard__Insights)		Visible <input type="checkbox"/>	Default <input type="radio"/>																																									
App Launcher (standard__AppLauncher)		Visible <input type="checkbox"/>	Default <input type="radio"/>	Tours & Travels CRM (Tours_Travels_CRM) <input checked="" type="checkbox"/>																																								
Platform (standard__Platform)		Visible <input checked="" type="checkbox"/>	Default <input type="radio"/>	WDC (standard__Work) <input type="checkbox"/>																																								
<b>Custom Object Permissions</b>																																												
<table border="1"> <thead> <tr> <th colspan="2">Basic Access</th> <th colspan="3">Data Administration</th> </tr> <tr> <th>Read</th> <th>Create</th> <th>Edit</th> <th>Delete</th> <th>View All Records <span style="color: blue;">i</span></th> <th>Modify All Records <span style="color: blue;">i</span></th> <th>View All Fields</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>					Basic Access		Data Administration			Read	Create	Edit	Delete	View All Records <span style="color: blue;">i</span>	Modify All Records <span style="color: blue;">i</span>	View All Fields	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<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"/>	<input type="checkbox"/>												
Basic Access		Data Administration																																										
Read	Create	Edit	Delete	View All Records <span style="color: blue;">i</span>	Modify All Records <span style="color: blue;">i</span>	View All Fields																																						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
<table border="1"> <thead> <tr> <th colspan="2">Basic Access</th> <th colspan="3">Data Administration</th> </tr> <tr> <th>Read</th> <th>Create</th> <th>Edit</th> <th>Delete</th> <th>View All Records <span style="color: blue;">i</span></th> <th>Modify All Records <span style="color: blue;">i</span></th> <th>View All Fields</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>					Basic Access		Data Administration			Read	Create	Edit	Delete	View All Records <span style="color: blue;">i</span>	Modify All Records <span style="color: blue;">i</span>	View All Fields	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<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 <span style="color: blue;">i</span>	Modify All Records <span style="color: blue;">i</span>	View All Fields																																						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																																						
<b>Session Settings</b>																																												
Session Times Out After		2 hours of inactivity <span style="color: blue;">i</span>	Session Security Level Required at Login																																									
			--None-- <span style="color: blue;">i</span>																																									
<b>Password Policies</b>																																												
User passwords expire in <input type="text" value="Never expires"/> Enforce password history <input type="text" value="3 passwords remembered"/> Minimum password length <input type="text" value="8"/> Password complexity requirement <input type="text" value="Must include alpha and numeric characters"/> Password question requirement <input type="text" value="Cannot contain password"/> Maximum invalid login attempts <input type="text" value="10"/> Lockout effective period <input type="text" value="15 minutes"/> Obscure secret answer for password resets <input type="checkbox"/> Require a minimum 1 day password lifetime <input type="checkbox"/> Don't immediately expire links in forgot password emails <input type="checkbox"/> <span style="color: blue;">i</span>																																												

## ***Activity 2: Tour Guide Profile Creation***

**Profile**

## Tour Guide

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail		<a href="#">Edit</a>	<a href="#">Clone</a>	<a href="#">Delete</a>	<a href="#">View Users</a>
Name	Tour Guide				
User License	Salesforce Platform	<input checked="" type="checkbox"/> Custom Profile			
Description					
Created By	Kim Lois Sangil	7/14/2025, 2:29 AM	Modified By	Kim Lois Sangil	7/14/2025, 2:31 AM

**Custom Object Permissions**

	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Bookings	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Booking Guests	<input checked="" 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"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers Info	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedbacks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Travel Packages	<input checked="" type="checkbox"/>	<input type="checkbox"/>												

**Session Settings**

### **Activity 3: Finance Officer Profile Creation**

**Profile**

## Finance Officer

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Profile Detail	
Name	Finance Officer
User License	Salesforce Platform
Description	
Created By	Kim Lois Sangil, 7/14/2025, 2:32 AM
Modified By	Kim Lois Sangil, 7/14/2025, 2:33 AM

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Cloud Access \[0\]](#)  
[Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Field Access \[0\]](#)

## ***Activity 4: Marketing Executive Profile Creation***

## ***Activity 5: Customer Service Rep Profile Creation***

## Milestone 24: Roles & Role Hierarchy

### Activity 1: Creation of Travel Agent Manager Role

The screenshot shows the Salesforce Setup interface for creating a new role. The top navigation bar includes a user icon, the word "SETUP", and the "Roles" section. Below this, the title "Role Edit" is displayed above the role name "Travel Agent Manager". The "Role Edit" form contains the following fields:

Label	Travel Agent Manager
Role Name	Travel_Agent_Manager <span style="color: blue;">i</span>
This role reports to	CEO <span style="color: blue;">🔍</span>
Role Name as displayed on reports	Travel Agent Manager

## **Activity 2: Creation other Roles Under Travel Agent Manager Role**

The screenshot shows the SAP Fiori interface for creating roles. It consists of two vertically stacked cards, each representing a role edit screen.

**Top Card (Travel Agent):**

- Header:** SETUP Roles
- Title:** Role Edit
- Role Name:** Travel Agent
- Fields:**
  - Label:** Travel Agent
  - Role Name:** Travel\_Agent
  - This role reports to:** Travel Agent Manager
  - Role Name as displayed on reports:** Travel Agent

**Bottom Card (Travel Tour Guide):**

- Header:** SETUP Roles
- Title:** Role Edit
- Role Name:** Travel Tour Guide
- Fields:**
  - Label:** Travel Tour Guide
  - Role Name:** Travel\_Tour\_Guide
  - This role reports to:** Travel Agent Manager
  - Role Name as displayed on reports:** Travel Tour Guide

### **Activity 3: Creation other Three Roles Under CEO Role**

 **SETUP**  
**Roles**

Role Edit  
**Finance Officer**

**Role Edit**

Label	Finance Officer Role
Role Name	Finance_Officer_Role <a href="#">i</a>
This role reports to	CEO <a href="#">🔍</a>
Role Name as displayed on reports	Finance Officer Role

 **SETUP**  
**Roles**

Role Edit  
**New Role**

**Role Edit**

Label	Marketing Executive Role
Role Name	Marketing_Executive_Role <a href="#">i</a>
This role reports to	CEO <a href="#">🔍</a>
Role Name as displayed on reports	Marketing Executive Role

**SETUP**



## Roles

Role Edit

### New Role

**Role Edit**

Label	Customer Service Rep Role
Role Name	Customer_Service_Rep_Rol <a href="#">i</a>
This role reports to	CEO <a href="#">🔍</a>
Role Name as displayed on reports	Customer Service Rep Role

## Milestone 25: Permission Set

### Activity 1: Creating New Permission Set

**Permission Sets**

Permission Set  
Extra Permission For Travel Agent Manager [Video Tutorial](#)

**Permission Set Overview**

Description	API Name
License	Namespace Prefix
Session Activation Required <input type="checkbox"/>	Created By <a href="#">Kim Lois Sangil</a> , 7/14/2025, 2:44 AM
Permission Set Groups Added To 0	Last Modified By <a href="#">Kim Lois Sangil</a> , 7/14/2025, 2:44 AM

... > SETUP > PERMISSION SET 'EXTRA PERMISSION FOR TRAVEL AGENT MANAGER'

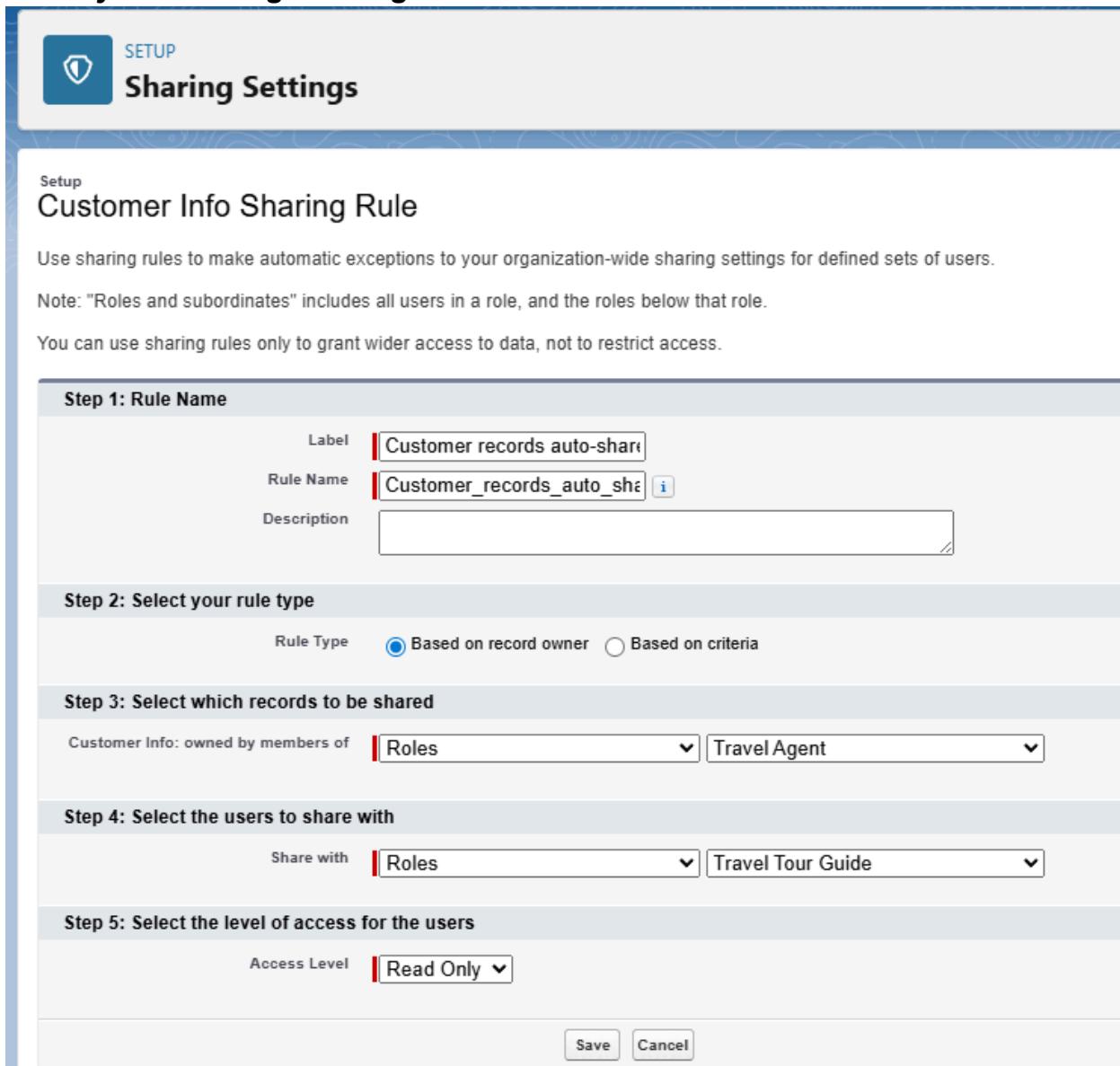
**Extra Permission For Travel Agent Manager**

**Current Assignments**

<input type="checkbox"/> Full Name ↑	Active	Role	Profile	User License	Expires On
<input type="checkbox"/> Michael Jackson	✓	Travel Agent Manager	Travel Agent	Salesforce Platform	

## Milestone 26: Permission Set

### Activity 1: Creating Sharing Rule



The screenshot shows the 'Sharing Settings' page in Salesforce. The top navigation bar includes 'SETUP' and the 'Sharing Settings' tab. Below the header, the section title is 'Customer Info Sharing Rule'. A descriptive note states: 'Use sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.' It also notes: 'Note: "Roles and subordinates" includes all users in a role, and the roles below that role.' A warning message says: 'You can use sharing rules only to grant wider access to data, not to restrict access.' The page is divided into five steps:

- Step 1: Rule Name**: Fields include 'Label' (Customer records auto-share), 'Rule Name' (Customer\_records\_auto\_shar), and 'Description' (empty).
- Step 2: Select your rule type**: 'Rule Type' is set to 'Based on record owner'.
- Step 3: Select which records to be shared**: 'Customer Info: owned by members of' dropdowns show 'Roles' and 'Travel Agent'.
- Step 4: Select the users to share with**: 'Share with' dropdowns show 'Roles' and 'Travel Tour Guide'.
- Step 5: Select the level of access for the users**: 'Access Level' dropdown shows 'Read Only'.

At the bottom right are 'Save' and 'Cancel' buttons.

## Milestone 27: Test Classes

### Activity 1: Creation of a Test Class

I was able to encounter 2 errors in this activity due to Places\_Covered\_\_c and Booking\_Date\_\_c missing from the code itself so I added two lines of code to the given in the instructions which resulted to the test succeeding and the two lines of code i added were:

**Places\_Covered\_\_c = 'Rome, Paris, Madrid'**

**Booking\_Date\_\_c = Date.today(),**

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The main area displays the Apex code for the BookingTriggerTest class. The code creates a package record and a booking record, setting the Booking\_Status\_\_c to 'Pending' and the Booking\_Date\_\_c to the current date plus ten days. It then starts and stops a test run. Below the code editor is a table showing the status of various test runs and the overall code coverage report.

Status	Test Run	Enqueued Time	Duration	Failures	Total	Overall Code Coverage
✗	TestRun @ 6:00:47 pm			1	1	Class
✗	TestRun @ 6:04:57 pm			1	1	Percent
✗	TestRun @ 6:08:02 pm			1	1	35%
✓	TestRun @ 6:09:57 pm			0	1	BookingConfirmationEmailer
✓	BookingTriggerTest			0	1	0%
✓	testTriggerCreatesPaymentA...	0:00				BookingReminderQueueable
						0%
						BookingReminderScheduler
						0%
						BookingTrigger
						81%
						BookingTriggerHandler
						100%
						29/29

## Milestone 28: Preparing Test Cases & Fixing Defects

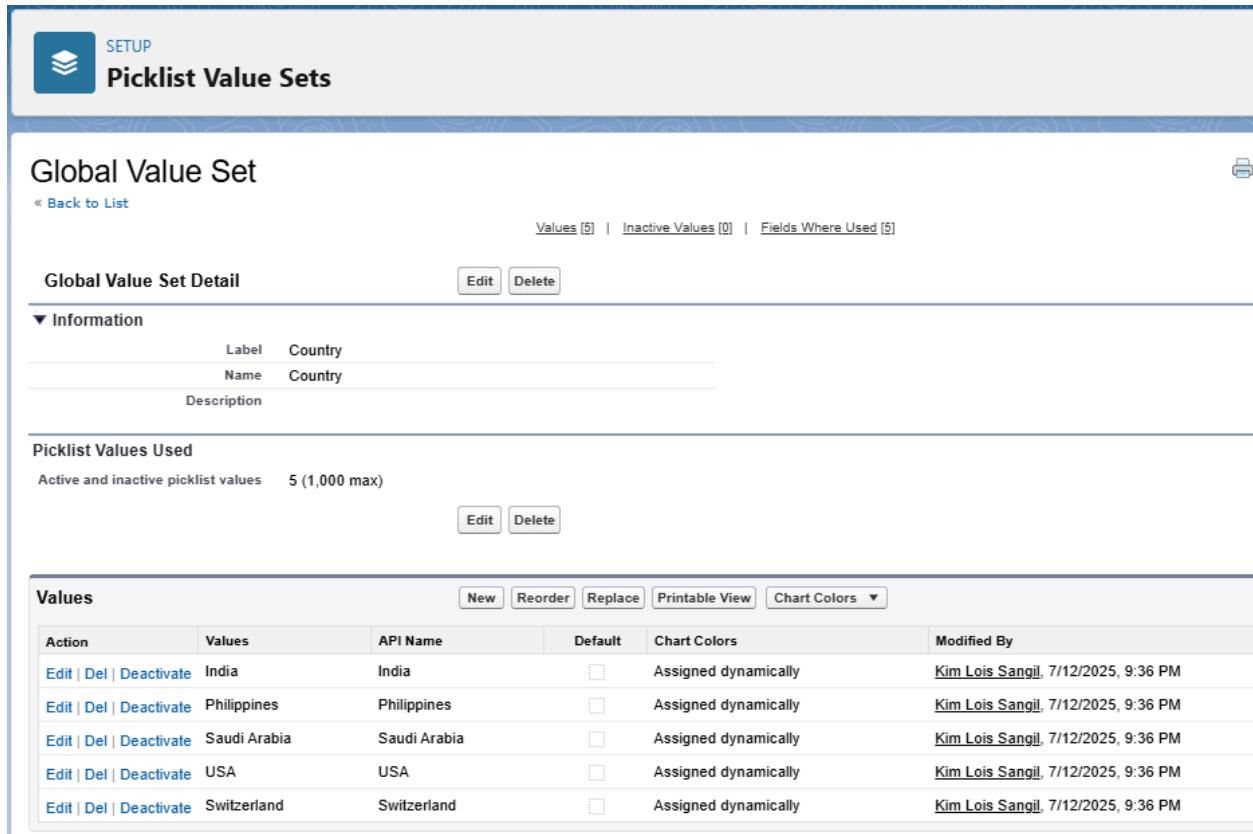
### Activity 1: Test Case 1: Customer Creation

While accomplishing this activity, I also noticed that I needed to fix the field dependencies of the city>country fields within the 'Customer Info' object, which I did, and also I have deleted other countries that did not seem to be countries (see screenshots below for steps taken)



The screenshot shows the 'Customer Info' object in the Object Manager. The 'Fields & Relationships' tab is selected. There are two fields listed: 'Age' (Formula Number) and 'City' (Picklist). The 'City' field is controlled by the 'Country' field.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Age	Age_c	Formula (Number)	
City	City_c	Picklist	Country

The screenshot shows the 'Global Value Set' for the 'Country' picklist. It has one value: 'Country'. The 'Values Used' section shows five active and inactive values.

Label	Country
Name	Country

**Values**

Action	Values	API Name	Default	Chart Colors	Modified By
Edit   Del   Deactivate	India	India	<input type="checkbox"/>	Assigned dynamically	Kim Lois Sangil, 7/12/2025, 9:36 PM
Edit   Del   Deactivate	Philippines	Philippines	<input type="checkbox"/>	Assigned dynamically	Kim Lois Sangil, 7/12/2025, 9:36 PM
Edit   Del   Deactivate	Saudi Arabia	Saudi Arabia	<input type="checkbox"/>	Assigned dynamically	Kim Lois Sangil, 7/12/2025, 9:36 PM
Edit   Del   Deactivate	USA	USA	<input type="checkbox"/>	Assigned dynamically	Kim Lois Sangil, 7/12/2025, 9:36 PM
Edit   Del   Deactivate	Switzerland	Switzerland	<input type="checkbox"/>	Assigned dynamically	Kim Lois Sangil, 7/12/2025, 9:36 PM

**Confirmed that dependencies were fixed as city is greyed out before selecting a country:**

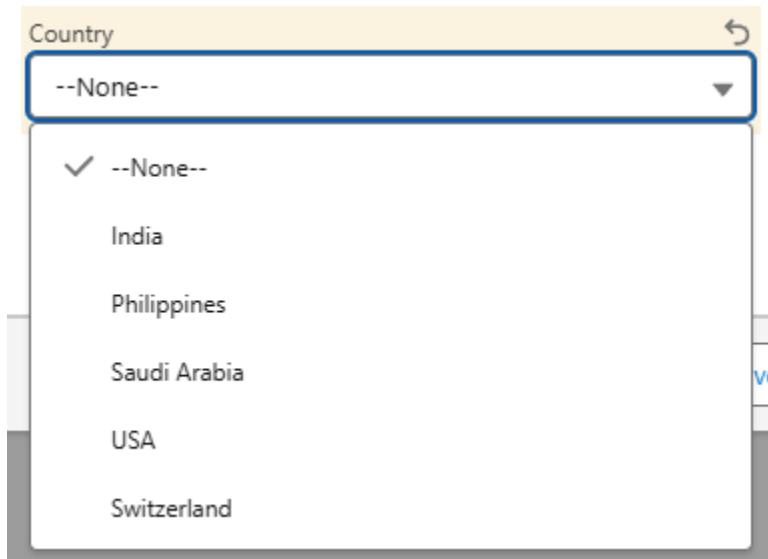
New Customer Info

\* = Required Information

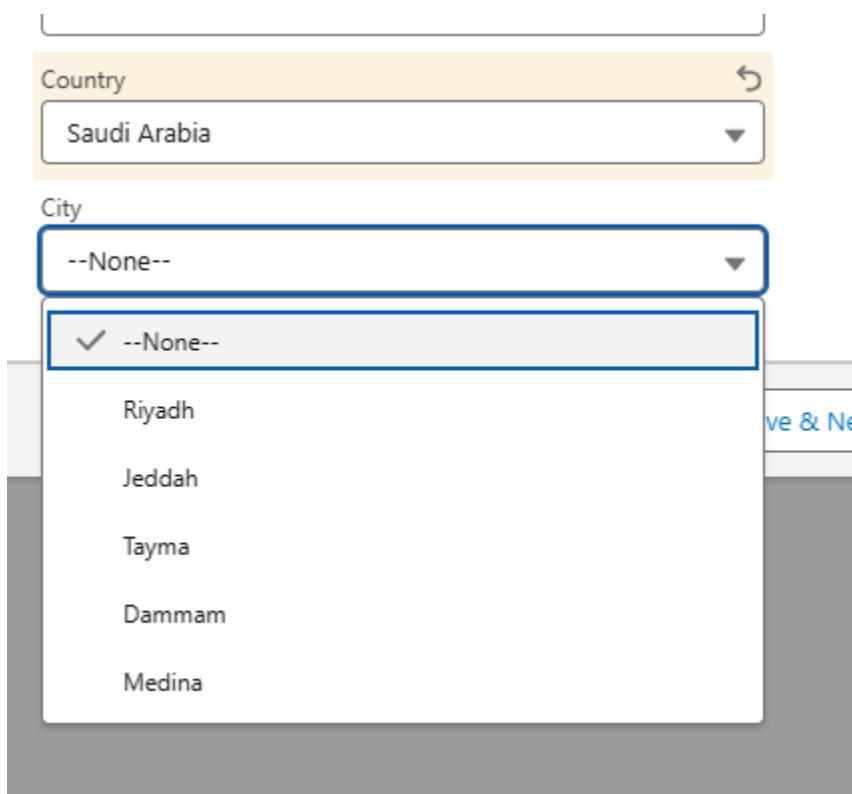
**Information**

Customer ID	* Date of Birth
<input type="text"/>	<input type="text"/> 
Complete this field with format 12/31/2024.	
* Customer Name	Owner
<input type="text"/>	 Kim Lois Sangil
Email	
<input type="text"/>	
Phone	
<input type="text"/>	
Country	↪
--None--	▼
City	
--None--	▼
<input type="button" value="Cancel"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Save"/>	

The proper countries are now showing up:



Also fixed that applicable cities are only going to show up to applicable countries:



## New Customer with populated fields (pre-save):

X

### New Customer Info

\* = Required Information

**Information**

Customer ID	* Date of Birth
<input type="text" value="Test Customer"/>	<input type="text" value="11/3/1988"/>
Email	Owner
<input type="text" value="tcustomer@capstone.com"/>	 Kim Lois Sangil
Phone	
<input type="text" value="3238589898"/>	
Country	
<input type="text" value="Saudi Arabia"/>	
City	
<input type="text" value="Riyadh"/>	

**Buttons**

## New Customer with populated fields (post-save):

The screenshot shows the 'Customer Info' tab in the 'Tours & Travels CRM' application. A success message at the top right states "Customer Info 'Test Customer' was created." The main area displays the 'Details' tab for a customer named 'Test Customer'. The details include:

Field	Value
Customer ID	GEN-2025-000014
Customer Name	Test Customer
Email	tcustomer@capstone.com
Phone	(323) 858-9898
Country	Saudi Arabia
City	Riyadh
Created By	Kim Lois Sangil, 7/14/2025, 3:36 AM
Date of Birth	11/3/1988
Age	36
Owner	Kim Lois Sangil
Last Modified By	Kim Lois Sangil, 7/14/2025, 3:36 AM

To the right, there is an 'Activity' section with a grid of icons for different types of activities. Below it, a message says "No activities to show. Get started by sending an email, scheduling a task, and more." Another message below that says "No past activity. Past meetings and tasks marked as done show up here."

## New Customer in Customer Info tab/list:

The screenshot shows the 'Customers Info' tab in the 'Tours & Travels CRM' application. A 'Recently Viewed' section lists two items:

Rank	Customer Name
1	Test Customer
2	Francis Yu

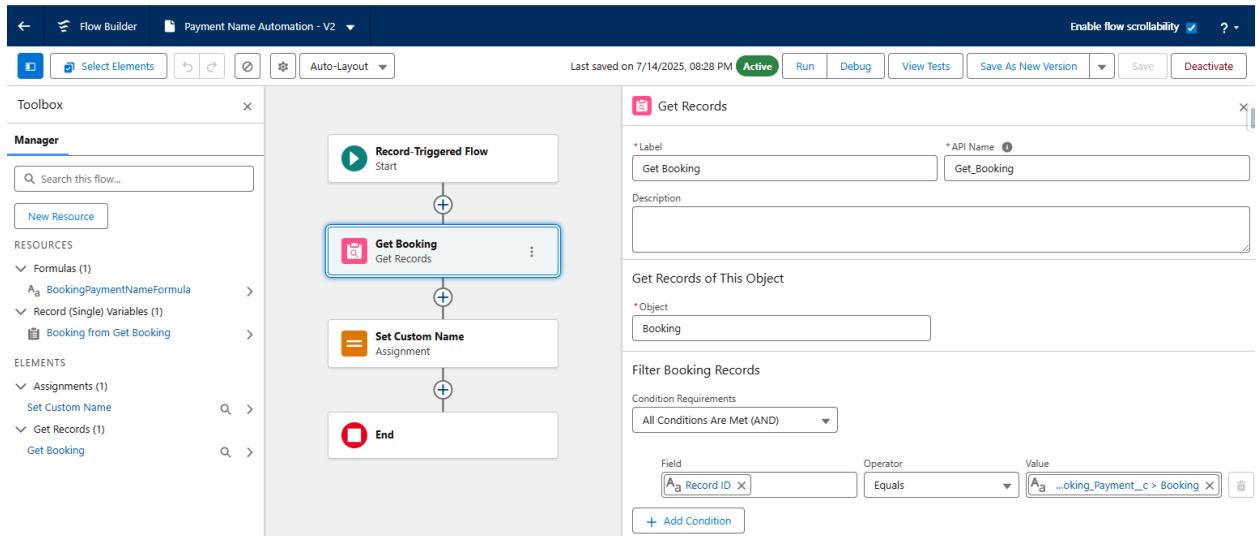
Below this, a message indicates "14 items • Updated a few seconds ago".

## Activity 2: Test Case 2: Booking Creation

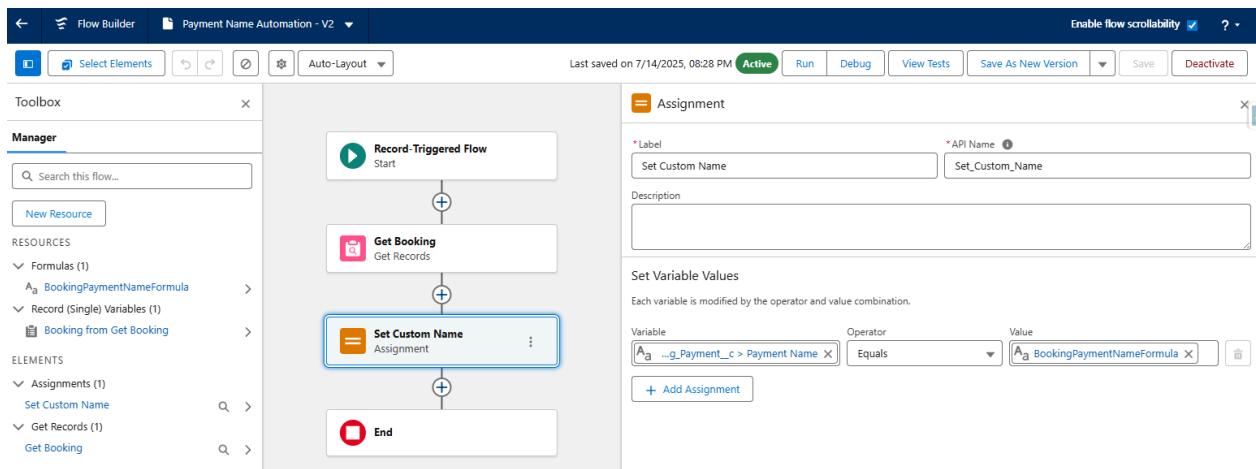
While creating the booking, I was able to create the booking itself but I found out that it does not automatically create a name for the ‘Booking Payment’ record.

So I created a flow to automatically have it named ‘Customer’s Name’ - ‘TravelPackage’ ‘DateCreated’ to better help finance employees keep track of new booking payments created.

### Get Booking:



### Name Assignment:



**BookPaymentName Formula:**

```
{!Get_Booking.Customer__r.Name} & " - " &  
{!Get_Booking.TravelPackage__r.Name} & " " &  
TEXT(MONTH(TODAY())) & "/" &  
TEXT(DAY(TODAY())) & "/" &  
RIGHT(TEXT(YEAR(TODAY())), 2)
```

## Booking Created (Saved Successfully):

Booking payBOOK

Related	Details
Information	
Booking Number	BK-0029
Customer	<a href="#">Test Customer</a>
Customer Email	dophilin24@gmail.com
TravelPackage	<a href="#">Basic Philippines Package</a>
Booking Date	7/14/2025
Travelling Start Date	7/21/2025
Travelling End Date	7/31/2025
Trip Type	
Membership	Basic
Preferred Accommodation	Resort
Include Travel Insurance	<input type="checkbox"/>
Require Visa Assistance	<input type="checkbox"/>
Require Tour Guide	<input type="checkbox"/>
Guide Assigned	
Preferred Guide Language	
No of Booking Guests Info Available	2
Number of Travelers	2
Booking Status	Pending
Travel Cost Per Person	\$8,000.00
Total Travel Amount	\$16,000.00
Accomodation Amount per Person per Day	\$5,000.00
Cancellation Reason	
Total Accomodation Amount	\$10,000.00
Total Billing Amount	\$26,000.00
Owner	<a href="#">Kim Lois Sangil</a>

## Bookings List page:

The screenshot shows a software interface for managing bookings. At the top, there's a purple phone icon followed by the word "Bookings". Below that, a bold black header reads "Recently Viewed ▾" with a small blue arrow icon to its right. Underneath this, a message indicates "25 items • Updated 16 minutes ago". A table follows, with the first column containing a checkbox and the second column containing the booking name. The first row of the table is highlighted in light gray. The data in the table is as follows:

	Booking Name
1	<input type="checkbox"/> payBOOK

## Booking Payment Result (Automated Successfully):

Booking  
**payBOOK**

Related	Details
Information	
Booking Number	BK-0029
Customer	<a href="#">Test Customer</a>
Customer Email	dophilin24@gmail.com
TravelPackage	<a href="#">Basic Philippines Package</a>
Booking Date	7/14/2025
Travelling Start Date	7/21/2025
Travelling End Date	7/31/2025
Trip Type	
Membership	Basic
Preferred Accommodation	Resort
Include Travel Insurance	<input type="checkbox"/>
Require Visa Assistance	<input type="checkbox"/>
Require Tour Guide	<input type="checkbox"/>
Guide Assigned	
Preferred Guide Language	
No of Booking Guests Info Available	2
Number of Travelers	2
Booking Status	Pending
Travel Cost Per Person	\$8,000.00
Total Travel Amount	\$16,000.00
Accomodation Amount per Person per Day	\$5,000.00
Cancellation Reason	
Total Accomodation Amount	\$10,000.00
Total Billing Amount	\$26,000.00
Owner	<a href="#">Kim Lois Sangil</a>

Booking Payment  
Test Customer - Basic Philippines Package 7/14/25

Related	Details
Payment Number PNUM-0000000034	Payment Method <a href="#">Edit</a>
Customer Name Test Customer	Payment Reference Number <a href="#">Edit</a>
Booking <a href="#">payBOOK</a>	Payment Mode Details <a href="#">Edit</a>
Payment Date 7/14/2025	Payment Receipt Sent <input type="checkbox"/> <a href="#">Edit</a>
Total Bill Amount \$26,000.00	Owner  <a href="#">Kim Lois Sangil</a> <a href="#">Edit</a>
Payment Status Pending	Last Modified By  <a href="#">Kim Lois Sangil</a> , 7/14/2025, 5:31 AM
Notes <a href="#">Edit</a>	Payment Name Test Customer - Basic Philippines Package 7/14/25 <a href="#">Edit</a>
Created By  <a href="#">Kim Lois Sangil</a> , 7/14/2025, 5:31 AM	

## Booking Guests Records (Automated Successfully):

Booking  
**payBOOK**

Related	Details
 <a href="#">Booking Guests (2)</a>	<a href="#">New</a>
Booking Guest Name	
Guest 1	<a href="#">View</a>
Guest 2	<a href="#">View</a>
<a href="#">View All</a>	

## **Activity 3: Test Case 3: Payment Status Update & Email Notification**

### **Booking Payment Completed:**

Booking Payment  
**Test Customer - Basic Philippines Package 7/14/25**

Related	Details
Payment Number	PNUM-0000000034
Customer Name	Test Customer
Booking	payBOOK
Payment Date	7/14/2025
Total Bill Amount	\$26,000.00
Payment Status	Completed
Notes	
Created By	 <a href="#">Kim Lois Sangil</a> , 7/14/2025, 5:31 AM
Payment Method	
Payment Reference Number	
Payment Mode Details	
Payment Receipt Sent	<input type="checkbox"/>
Owner	 <a href="#">Kim Lois Sangil</a> 
Last Modified By	 <a href="#">Kim Lois Sangil</a> , 7/14/2025, 6:16 AM
Payment Name	Test Customer - Basic Philippines Package 7/14/25

## Booking Status Automatically Confirmed:

Booking payBOOK

Related **Details**

Information

Booking Number	BK-0029	Number of Travelers	2
Customer	<a href="#">Test Customer</a>	Booking Status	Confirmed
Customer Email	dolphin24@gmail.com	Travel Cost Per Person	\$8,000.00
Travel Package	<a href="#">Basic Philippines Package</a>	Total Travel Amount	\$16,000.00
Booking Date	7/14/2025	Accommodation Amount per Person per Day	\$5,000.00
Travelling Start Date	7/21/2025	Cancellation Reason	
Travelling End Date		Total Accommodation Amount	

## Email Received:

### Booking Confirmed: payBOOK Inbox ×

① Kim Lois Sangil [sangil.kimlois@auf.edu.ph](mailto:sangil.kimlois@auf.edu.ph) via h0mzuo2zd8... 9:16 PM (5 minutes ago)

to me ▾

Dear Customer,

Your booking has been confirmed. Please find the details below:

Booking ID: payBOOK

Total Bill Amount Paid: \$26000.00

Thank you for booking with us!

1 delete ever.

from: Kim Lois Sangil  
<sangil.kimlois@auf.edu.ph>  
via h0mzuo2zd8ysz6lv.y9l79.gl-  
6conduam.can98.bnc.salesforce.com

to: "dophlin24@gmail.com"  
<dophlin24@gmail.com>

date: Jul 14, 2025, 9:16 PM

subject: Booking Confirmed: payBOOK

mailed-by: h0mzuo2zd8ysz6lv.y9l79.gl-  
6conduam.can98.bnc.salesforce.com

security: Standard encryption (TLS) [Learn more](#)

### Booking Confirmed: payBOOK Inbox ×

① Kim Lois Sangil [sangil.kimlois@auf.edu.ph](mailto:sangil.kimlois@auf.edu.ph) via h0mzuo2zd8... 9:16 PM (5 minutes ago)

to me ▾

Dear Customer,

Your booking has been confirmed. Please find the details below:

Booking ID: payBOOK

Total Bill Amount Paid: \$26000.00

Thank you for booking with us!

## **Activity 4: Other Test Cases**

### **TEST CASE 1: Booking Creation > Booking Payments Automation**

**Purpose:** Users should be able to create 'Bookings' without having to create 'Booking Payments' for the created booking.

#### **Input Data:**

Customer: Luis Manalo

Email: Dophlin24@gmail.com

TravelPackage: (VIP) Premium India Package

Booking Date: 7/14/25

Travelling Start Date: 7/16/25

Membership: VIP

Preferred Accomodation: Luxury Hotel

Number of Travelers: 6

Booking Status: Pending

Booking Name: LManalo - Test Case 1

#### **Steps to Execute:**

1. Go to the 'Booking' tab (Travels&ToursCRM) > New
2. Fill all required fields
3. Save
4. Go to the 'Booking Payments' tab
5. Verify if 'Booking Payments' record has automatically been processed.

#### **Expected Outputs:**

- Created 'Booking' information carries over to 'Booking Payments'

#### **Actual Result:**

- 'Booking' processed carried over to 'Booking Payments' successfully

#### **Status:**

Pass

## Remarks:

Booking Luis Manalo - Booking 7/14/25

Related	Details
Information	
Booking Number	BK-0030
Customer	Luis Manalo
Customer Email	dophlin24@gmail.com
TravelPackage	(VIP) Premium India Package
Booking Date	7/14/2025
Travelling Start Date	7/16/2025
Travelling End Date	7/21/2025
Trip Type	Family
Membership	VIP
Preferred Accommodation	Luxury Hotel
Number of Travelers	6
Booking Status	Pending
Travel Cost Per Person	\$10,000.00
Total Travel Amount	\$60,000.00
Accomodation Amount per Person per Day	\$20,000.00
Cancellation Reason	
Total Accomodation Amount	\$120,000.00
Total Billing Amount	\$180,000.00
Owner	Kim Lois Sangil

Booking Payment Luis Manalo - (VIP) Premium India Package 7/14/25

Related	Details
Payment Number	PNUM-0000000035
Customer Name	Luis Manalo
Booking	Luis Manalo - Booking 7/14/25
Payment Date	7/14/2025
Total Bill Amount	\$180,000.00
Payment Status	Pending
Notes	
Payment Method	
Payment Reference Number	
Payment Mode Details	
Payment Receipt Sent	<input type="checkbox"/>
Owner	Kim Lois Sangil

## **TEST CASE 2: Trip Cancellation with Reason Capture & Approval**

**Purpose:** Cancellation of bookings should trigger the approval process of the booking cancellation being requested to the immediate manager. Also, the immediate manager should be able to see the booking in the 'Items to Approve' tab. The approved cancellation should also reflect in the booking's 'Related' tab.

I have also added a new flow here for the 'Booking Name' to be added with (CANCELLED) if the approval was pushed through by the manager for better visibility.

### **Input Data:**

Customer: Sofia Reyes

Email: dophlin24@gmail.com

TravelPackage: Basic Philippines Package

Booking Date: 7/15/25

Travelling Start Date: 7/25/25

Membership: Basic

Number of Travelers: 2

Preferred Accommodation: Resort

Booking Name: SReyes - Test Case 2

Cancellation Date: 7/14/25

Cancellation Reason: "Family Emergency"

### **Steps to Execute:**

1. Login in a 'Travel Agent' Account
2. Go to the 'Booking' tab > New
3. Fill in the required fields
4. Save the booking
5. Open the newly created booking
6. Click Edit
7. Enter a cancellation reason in Cancellation Reason
8. Set Cancel Confirmation checkbox to true
9. Save the record and submit for approval
10. Log in as approver > Go to Approvals > Approve the cancellation
11. Confirm that Approval Status = Approve

**Expected Outputs:**

- Booking is saved successfully
- Cancellation reason and date are captured
- Approval process is triggered
- Once approved, Approval Status is updated

**Actual Result:**

Cancellation approval was not working, so I edited the approval process due to the approver being assigned as me/admin so I changed it to the immediate manager of the submitter.

After the cancellation was approved, it just changed to 'Pending' instead of 'Closed', so I changed the 'Initial Submission Actions' in the 'Approval Process' page and changed it to set booking status to 'Closed' post-approval.

I have also added a flow wherein if a booking's cancellation has been approved, as soon as the booking status changes to 'Closed' it will add (CANCELLED) to its 'Booking Name' for better visibility.

**Status:**

Pass

**Remarks:**

Ensure all approvers are set up in the Approval Process in case of future issues.

## (Travel Agent Account) Booking Created:

Booking  
**Sofia Reyes - Booking 7/14/25**

Related	Details
▼ Information	
Booking Number	BK-0031
Customer	Sofia Reyes
Customer Email	dophlin24@gmail.com
TravelPackage	Basic Philippines Package
Booking Date	7/15/2025
Travelling Start Date	7/25/2025
Travelling End Date	8/4/2025
Trip Type	
Membership	Basic
Preferred Accommodation	Resort
Include Travel Insurance	<input type="checkbox"/>
Require Visa Assistance	<input type="checkbox"/>
Require Tour Guide	<input type="checkbox"/>
Guide Assigned	
Preferred Guide Language	
No of Booking Guests Info Available	2
Number of Travelers	2
Booking Status	Pending
Travel Cost Per Person	\$8,000.00
Total Travel Amount	\$16,000.00
Accomodation Amount per Person per Day	\$5,000.00
Cancellation Reason	
Total Accomodation Amount	\$10,000.00
Total Billing Amount	\$26,000.00
Owner	Ben Kadow

## (Travel Agent Account) Cancellation In Booking:

Booking Number	BK-0031	Number of Travelers	2
Customer	Sofia Reyes	Booking Status	Cancelled
Customer Email	dolphin24@gmail.com	Approval Status	
Travel Package	Basic Philippines Package	Cancellation Date	7/14/2025
Booking Date	7/15/2025	Cancel Confirmation	<input checked="" type="checkbox"/>
Travelling Start Date	7/25/2025	Travel Cost Per Person	\$8,000.00
Travelling End Date	8/4/2025	Total Travel Amount	\$16,000.00
Trip Type		Accommodation Amount per Person per Day	\$5,000.00
Membership	Basic	Cancellation Reason	Family Emergency
Preferred Accommodation	Resort	Total Accommodation Amount	\$10,000.00
Include Travel Insurance	<input type="checkbox"/>	Total Billing Amount	\$26,000.00
Require Visa Assistance	<input type="checkbox"/>	Owner	Ben Kadow
Require Tour Guide			

## (Travel Agent Manager Account) Cancellation Approval:

The screenshot shows a web-based CRM interface for 'Tours & Travels CRM'. At the top, there's a search bar and various navigation icons. The main title is 'Approval Request Booking Approval' with a status of 'Pending'. Below this, there are four columns of information: Submitter (Ben Kadow), Date Submitted (Jul 14, 2025), Actual Approver (Michael Jackson), and Assigned To (Michael Jackson). On the left, under 'Details', there's a 'Booking Details' section with fields like Booking Name (Sofia Reyes - Booking 7/14/25), Owner (Ben Kadow), Booking Number (BK-0031), Customer (Sofia Reyes), Travel Package (Basic Philippines Package), Travelling Start Date (7/25/2025), and Total Billing Amount (\$26,000.00). On the right, under 'Submitter Comments', Ben Kadow notes a cancellation due to 'Family Emergency' on Jul 14, 2025, at 11:15:54 PM.

## (Travel Agent Manager Account) Cancellation Approved:

The screenshot shows the same CRM interface after the approval process. The title now says 'Booking Approval' with a status of 'Approved'. The details remain the same: Submitter (Ben Kadow), Date Submitted (Jul 14, 2025), Actual Approver (Michael Jackson), and Assigned To (Michael Jackson). The 'Details' section for booking information is identical to the previous screenshot. On the right, under 'Approver Comments', Michael Jackson states that the cancellation has been approved on Jul 14, 2025, at 11:18:05 PM.

## Approval History:

Booking  
**Sofia Reyes - Booking 7/14/25**

**Related** Details

**Booking Guests (2)** New

**Booking Guest Name**

Guest 1 ▼

Guest 2 ▼

[View All](#)

**Approval History (2)**

Step Name	Date	Status	Assigned To
Travel Agent Manager Approval	7/14/2025, 11:18 PM	Approved	Michael Jackson <span>▼</span>
Approval Request Submitted	7/14/2025, 11:15 PM	Submitted	Ben Kadow <span>▼</span>

[View All](#)

**Booking Payments (1)** New

**Payment Name**

Sofia Reyes - Basic Philippines Package 7/14/25 ▼

[View All](#)

**Feedbacks (0)**

## Booking status changed to 'Closed' after approval:

Booking  
**Sofia Reyes - Booking 7/14/25**

Related **Details**

▼ Information

Booking Number	BK-0031	Number of Travelers	2
Customer	<a href="#">Sofia Reyes</a>	Booking Status	Closed
Customer Email	dophlin24@gmail.com	Travel Cost Per Person	\$8,000.00
TravelPackage	<a href="#">Basic Philippines Package</a>	Total Travel Amount	\$16,000.00
Booking Date	7/15/2025	Accomodation Amount per Person per Day	\$5,000.00
Travelling Start Date	7/25/2025	Cancellation Reason	Family Emergency
Travelling End Date	8/4/2025	Total Accomodation Amount	\$10,000.00
Trip Type		Total Billing Amount	\$26,000.00
Membership	Basic	Owner	<a href="#">Ben Kadow</a>
Preferred Accommodation	Resort		
Include Travel Insurance	<input type="checkbox"/>		
Require Visa Assistance	<input type="checkbox"/>		
Require Tour Guide	<input type="checkbox"/>		
Guide Assigned			
Preferred Guide Language			
No of Booking Guests Info Available	2		

## Booking Name Check Cancellation Formula:

The screenshot shows the 'Edit Formula' dialog box. At the top, it says 'Edit Formula'. Below that, there's a field labeled '\* API Name' containing 'Is\_Cancelled\_Not\_In\_Name'. A 'Description' field is empty. Under '\* Data Type', 'Boolean' is selected. The '\* Formula' section contains the expression 'NOT(CONTAINS({!\$Record.Name}, "(CANCELLED)"))'. Below the formula, there are buttons for 'Check Syntax' (which is valid) and 'Done'.

\* API Name ⓘ  
Is\_Cancelled\_Not\_In\_Name

Description

\* Data Type ⓘ  
Boolean

\* Formula

Insert a resource... 🔎 All Functions ▾ Insert a function... 🔎 Select an Operator... ▾

NOT(CONTAINS({!\$Record.Name}, "(CANCELLED)"))

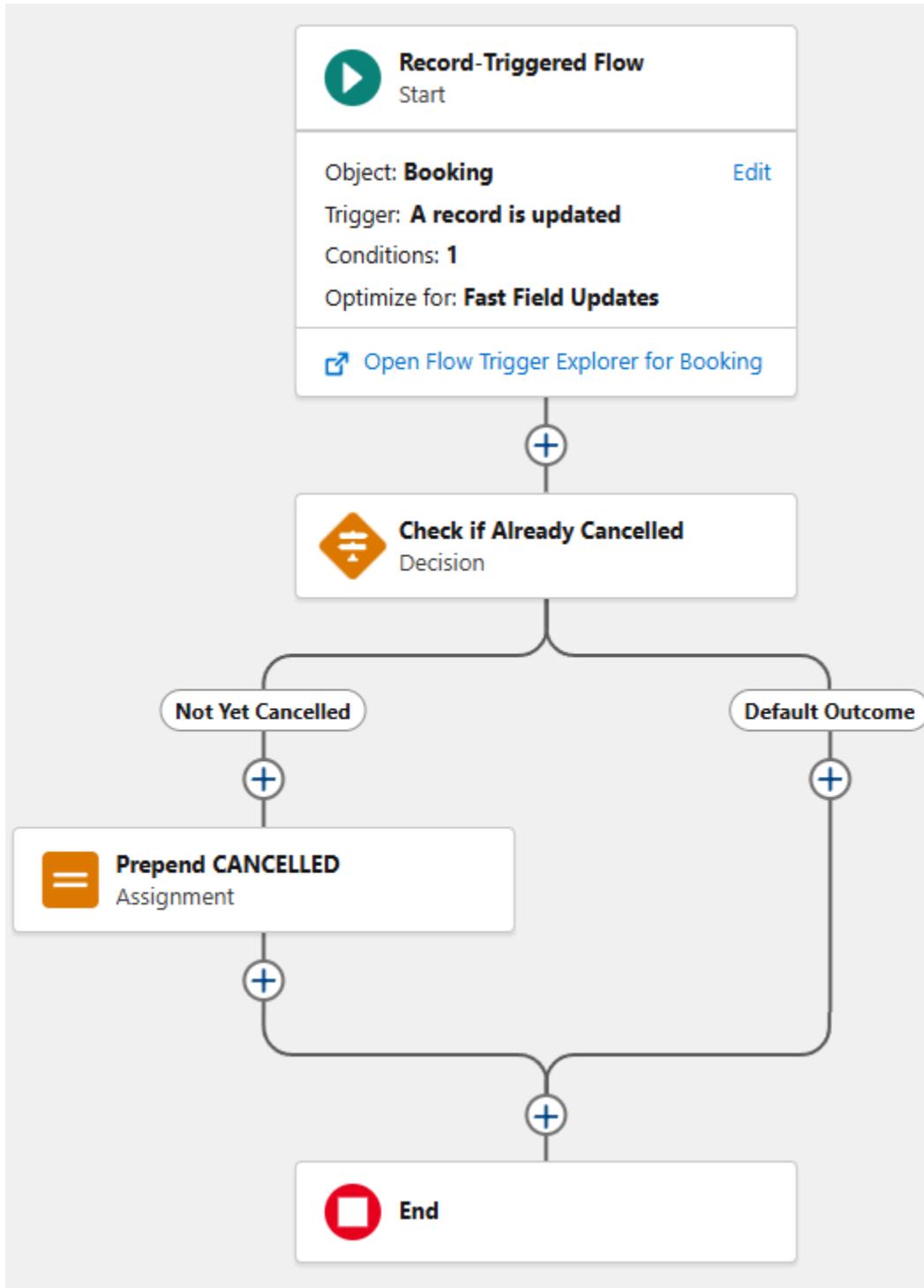
Check Syntax ✓ Valid

Cancel Done

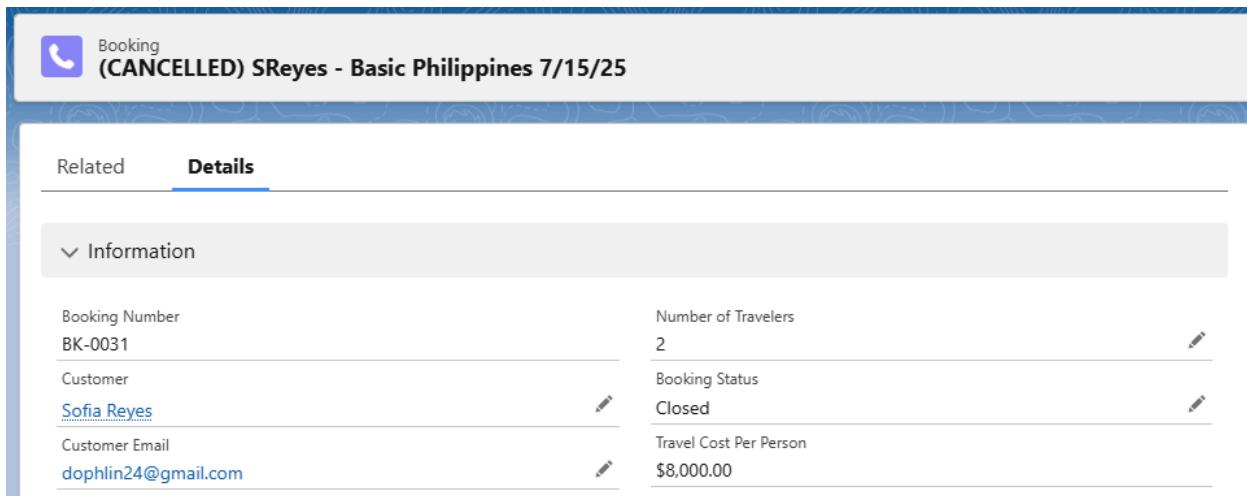
## Changing Booking Name Cancellation Formula:

IF(  
AND(  
TEXT({!\$Record.Booking\_Status\_\_c}) = "Closed",  
NOT(CONTAINS({!\$Record.Name}, "(CANCELLED)"))  
,  
"(CANCELLED) " & {!\$Record.Name},  
{!\$Record.Name}  
)

## Booking Name Cancellation Flow:



## Result of new cancellation flow:



The screenshot shows a booking cancellation interface. At the top, there's a header with a phone icon and the text "Booking (CANCELLED) SReyes - Basic Philippines 7/15/25". Below the header, there are two tabs: "Related" and "Details", with "Details" being the active tab. Under the "Details" tab, there's a section titled "Information" which is expanded. The information includes:

Booking Number	BK-0031	Number of Travelers	2
Customer	Sofia Reyes	Booking Status	Closed
Customer Email	dophlin24@gmail.com	Travel Cost Per Person	\$8,000.00

## TEST CASE 3: Booking Payment Confirmation Automation

**Purpose:** If 'Booking Payment' status has been changed to 'Complete' it should change the 'Booking Status' as 'Confirmed' and send the customer an email confirmation.

### Input Data:

Change 'Booking Payment' status from 'Pending' to 'Complete'

### Steps to Execute:

1. Log in as any user with Booking creation access
2. Go to Booking Tab > Click new
3. Fill in all required fields.
4. Set 'Booking Date' after the 'Travelling Start Date' (intentionally violating the rule)
5. Click Save
6. Error message should be displayed

### Expected Outputs:

- Error message should be displayed that rule has been validated

**Actual Result:**

**1st try** Did not work the first time due to no validation rule of this exists.

**2nd try** Fully activated and worked properly as intended after creating validation rule.

**Status:**

Pass

**Remarks:**

**Created Validation Rule:**

The screenshot shows the Salesforce Object Manager interface. At the top, there's a blue header bar with the 'SETUP' button and the 'Object Manager' label. Below this is a light gray sidebar with a blue decorative pattern. The main content area has a white background. At the top of the main area, it says 'Booking Validation Rule' and 'Back to Booking'. Below this, there's a section titled 'Validation Rule Detail' with two buttons: 'Edit' and 'Clone'. The validation rule details are listed in a table:

Rule Name	StartDate_Before_BookingDate	Active	✓
Error Condition Formula	Travelling_Start_Date__c < Booking_Date__c		
Error Message	Travelling Start Date must be after the Booking Date.	Error Location	Travelling Start Date
Description			
Created By	<a href="#">Kim Lois Sangil</a> , 7/15/2025, 12:15 AM	Modified By	<a href="#">Kim Lois Sangil</a> , 7/15/2025, 12:15 AM

At the bottom of the main content area, there are two small buttons: 'Edit' and 'Clone'.

## Error message while creating the booking:

Edit Sofia Reyes - Booking 7/15/25

\* = Required Information

**Information**

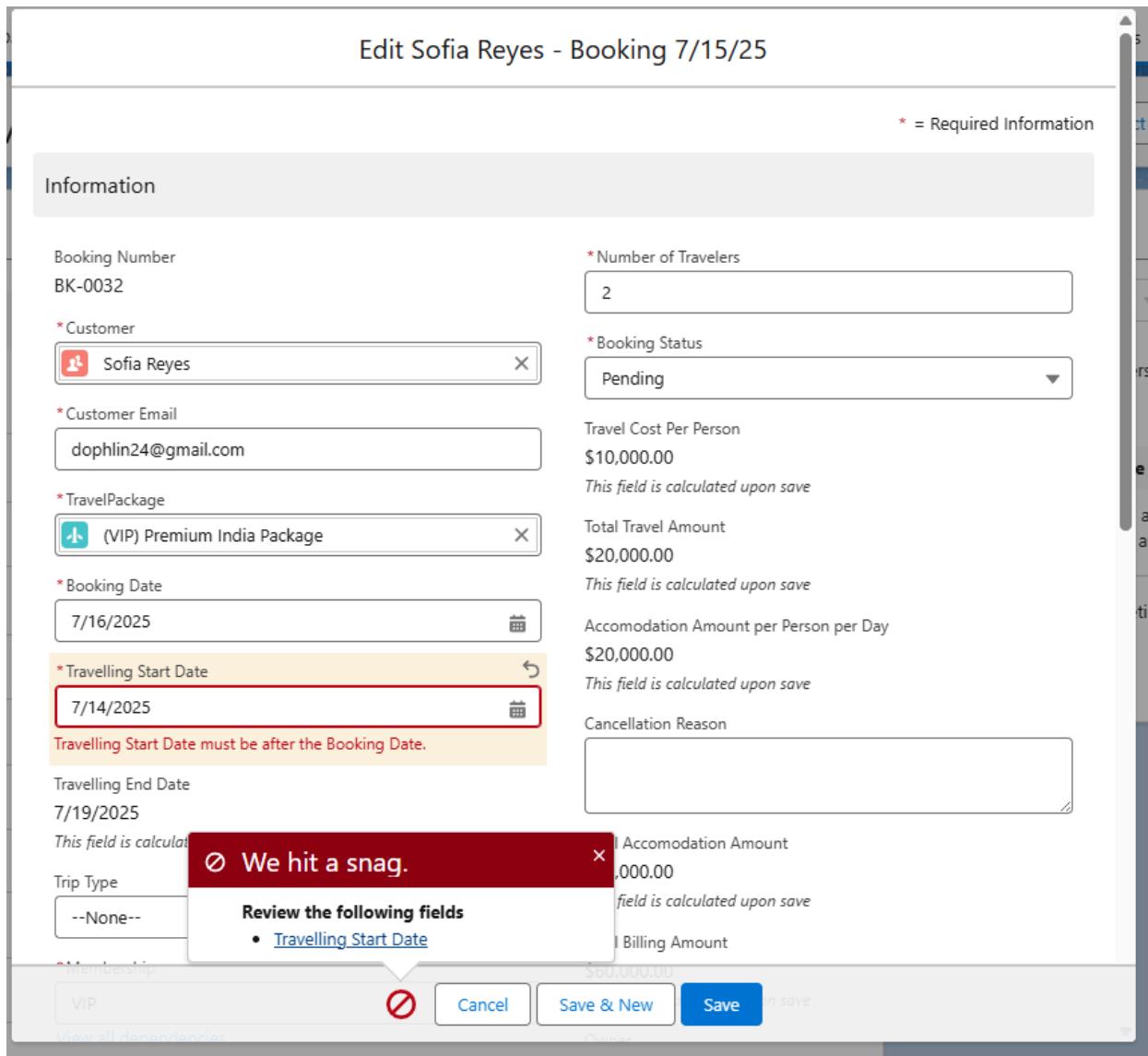
Booking Number BK-0032	* Number of Travelers 2
* Customer Sofia Reyes	* Booking Status Pending
* Customer Email dophilin24@gmail.com	Travel Cost Per Person \$10,000.00 <i>This field is calculated upon save</i>
* TravelPackage (VIP) Premium India Package	Total Travel Amount \$20,000.00 <i>This field is calculated upon save</i>
* Booking Date 7/16/2025	Accomodation Amount per Person per Day \$20,000.00 <i>This field is calculated upon save</i>
* Travelling Start Date 7/14/2025	Cancellation Reason
Travelling Start Date must be after the Booking Date.	
Travelling End Date 7/19/2025 <i>This field is calculated upon save</i>	
Trip Type --None--	Accomodation Amount \$0.00 <i>This field is calculated upon save</i>
Membership VIP	Billing Amount \$60,000.00 <i>This field is calculated upon save</i>

**We hit a snag.**

Review the following fields

- [Travelling Start Date](#)

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



## TEST CASE 4: Booking Payment Completion Automate

**Purpose:** To prevent manually changing a booking's status when a payment has been completed by a customer.

### Input Data:

Change 'Booking Payments' status from 'Pending' to 'Complete'

**Steps to Execute:**

1. Go to the Booking Payments tab
2. Change 'Booking Payments' status from 'Pending' to 'Completed'
3. Go to the Booking tab
4. Check created booking if 'Booking Status' has been updated to 'Confirmed' status
5. Check email inbox registered if automated email has been received

**Expected Outputs:**

- 'Booking Status' changes to 'Confirmed' when 'Booking Payments' status is 'Completed'
- Email notification sent to the registered booking

**Actual Result:**

- After 'Booking Payment' status was 'Completed' 'Booking Status' was automatically changed to 'Confirmed'
- Email notification was received to the email registered in the booking.

**Status:**

Pass

## Remarks:

Booking Payment  
**Luis Manalo - (VIP) Premium India Package 7/14/25**

Related	Details
Payment Number PNUM-0000000035	Payment Method <a href="#"></a>
Customer Name Luis Manalo	Payment Reference Number <a href="#"></a>
Booking <a href="#">Luis Manalo - Booking 7/14/25</a>	Payment Mode Details <a href="#"></a>
Payment Date 7/14/2025	Payment Receipt Sent <input type="checkbox"/> <a href="#"></a>
Total Bill Amount \$180,000.00	Owner <a href="#">Kim Lois Sangil</a> <a href="#"></a>
Payment Status Completed	Last Modified By <a href="#">Kim Lois Sangil</a> , 7/14/2025, 10:08 PM
Notes <a href="#"></a>	Payment Name <a href="#">Luis Manalo - (VIP) Premium India Package 7/14/25</a> <a href="#"></a>



Booking

**Luis Manalo - Booking 7/14/25**

Related

**Details****Information**

Booking Number

BK-0030

Number of Travelers

6

Customer

Luis Manalo

Customer Email

[Imanalo@capstone.com](mailto:Imanalo@capstone.com)

Booking Status

Confirmed



TravelPackage

(VIP) Premium India Package

Travel Cost Per Person

\$10,000.00

Booking Date

7/14/2025

Total Travel Amount

\$60,000.00

Travelling Start Date

7/16/2025

Accomodation Amount per Person per Day

\$20,000.00

Travelling End Date

7/21/2025

Cancellation Reason



Trip Type

Family



Membership

VIP

Total Accomodation Amount

\$120,000.00



Preferred Accommodation

Luxury Hotel



Include Travel Insurance



Require Visa Assistance



Require Tour Guide



Guide Assigned



Preferred Guide Language



No of Booking Guests Info Available

6



## Booking Confirmed: Luis Manalo - Booking 7/14/25 Inbox ×



**Kim Lois Sangil** sangil.kimlois@auf.edu.ph via 8yvoueyx73knulgffpl74.gl-6conduam.can98.bnc.sale... 1:10 PM (0 minutes ago)  
to me ▾

Dear Customer,

Your booking has been confirmed. Please find the details below:

Booking ID: Luis Manalo - Booking 7/14/25

Total Bill Amount Paid: \$180000.00

Thank you for booking with us!

## TEST CASE 5: Field Dependencies - Accommodation Options Based on Membership

**Purpose:** Ensuring that the applicable 'Accommodations' options show up to the applicable 'Membership' selected.

### Input Data:

Modify 'Membership' data and review available 'Accommodation' options.

### Steps to Execute:

1. Go to Bookings tab
2. Click New to create a new booking
3. Modify 'Membership'
4. Review available 'Accommodation' options

### Expected Outputs:

- 'Basic' membership will offer only 'Hotel' & 'Resort' accommodations
- 'Gold' membership will offer only 'Guest House' & 'Villa' accommodations
- 'VIP' membership will offer only 'Villa' , 'Cottage' & 'Luxury Hotel' accommodations.

### Actual Result:

- When selecting 'Basic' membership options offered are 'Hotel' & 'Resort' accommodations

- When selecting 'Gold' membership options offered are 'Guest House' & 'Villa' accommodations
- When selecting 'VIP' membership options offered are 'Villa' , 'Cottage' & 'Luxury Hotel' accommodations.

**Status:**

Pass

**Remarks:**

\* Membership

Basic

[View all dependencies](#)

\* Preferred Accommodation

--None--

--None--

Hotel

Resort

Require Visa Assistance

\* Membership

Gold

[View all dependencies](#)

\* Preferred Accommodation

--None--

--None--

Guest House

Villa

Require Visa Assistance

\* Membership

VIP

[View all dependencies](#)

\* Preferred Accommodation

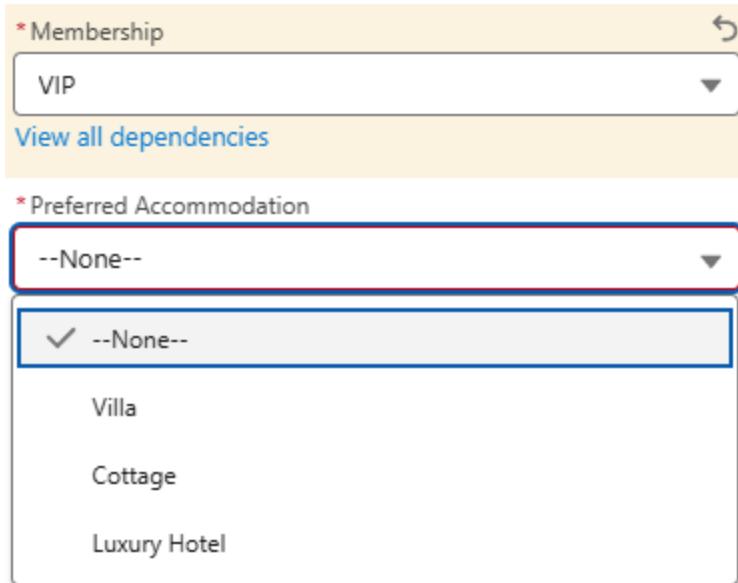
--None--

--None--

Villa

Cottage

Luxury Hotel



## TEST CASE 6: Travel Package Creation & Usage

**Purpose:** Ensuring that the created 'Travel Package' will show as an option when creating a booking.

### Input Data:

Travel Package Name: Test Case 5 – Summer Europe Package

Country: Switzerland

Location: Europe

Duration (Days): 10

Price per Person: 2500

### Steps to Execute:

1. Go to Travel Package tab
2. Click New to create new Travel Package
3. Fill-in required fields
4. Go to Bookings tab
5. Click new to create new booking
6. Click on 'TravelPackage' field
7. Verify created Travel Package can be chosen.

## **Expected Outputs:**

- Created Travel Package should show as an option when creating new bookings.

## **Actual Result:**

- The Travel Package created titled 'Test Case 5 – Summer Europe Package' showed as an option in the new booking form.

## **Status:**

Pass

## **Remarks:**

### **New Travel Packge Form:**

The screenshot shows a 'New Travel Package' form with a header indicating '\* = Required Information'. The form is divided into sections: 'Information' and 'Details'. The 'Information' section contains fields for 'Travel Package Name' (set to 'Test Case 5 – Summer Europe Pack'), 'Country' (set to 'Switzerland'), 'Places Covered' (set to 'Switzerland, Amsterdam'), 'Region' (set to 'Europe'), and 'Duration in Days' (set to '10'). The 'Details' section is partially visible below the 'Information' section.

Information	
*Travel Package Name	Travel Package Name: Test Case 5 – Summer Europe Pack
Region	Europe
*Duration in Days	10
*Country	Switzerland
*Places Covered	Switzerland, Amsterdam
*Price Per Person	\$2,500.00

## New Booking Form with Newly Created TravelPackage:

D

2

25

P

ne

ka

### New Booking

\* = Required Information

#### Information

Booking Number

\* Customer

Search Customers Info... 

Complete this field.

\* Customer Email

\* TravelPackage

Search Travel Packages... 

#### Recent Travel Packages

 Travel Package Name: Test Case 5 – Summer Europe Pac...

 Desert Discovery

 Mid Thai Adventure

 (VIP) Premium India Package

 Basic Philippines Package

+ New Travel Package

\* Number of Travelers

\* Booking Status

--None-- 

Travel Cost Per Person  
\$0.00

*This field is calculated upon save*

Total Travel Amount  
\$0.00

*This field is calculated upon save*

Accomodation Amount per Person per Day  
\$0.00

*This field is calculated upon save*

Cancellation Reason

Total Accomodation Amount  
\$0.00

*This field is calculated upon save*

## Milestone 29: Data Import Wizard

**Activity 1: Importing Records into Customer Info, TravelPackage and Employee Objects**

**TravelPackage.csv Result Success:**

Bulk Data Load Job Detail		Reload		K	
Job ID	750gL000008Q1tZ	Job Type	Bulk V1	Status	Closed
Submitted By	Kim Lois Sangil	Operation	Insert	Total Processing Time (ms)	138
Start Time	7/15/2025, 2:06 AM PST	Queued Batches	0	API Active Processing Time (ms)	75
End Time	7/15/2025, 2:06 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:]mm:ss)	00:01	Completed Batches	1		
Object	Travel Package	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	20		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

## Customer\_Info.csv Result Success:

Bulk Data Load Job Detail		Reload			
Job ID	750gL000008Q43P	Job Type	Bulk V1	Status	Closed
Submitted By	Kim Lois Sangil	Operation	Insert	Total Processing Time (ms)	107
Start Time	7/15/2025, 2:12 AM PST	Queued Batches	0	API Active Processing Time (ms)	68
End Time	7/15/2025, 2:12 AM PST	In Progress Batches	0	Apex Processing Time (ms)	23
Time to Complete ([hh:]mm:ss)	00:01	Completed Batches	1		
Object	Customer Info	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	20		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

## Employee.csv Result Success:

Bulk Data Load Job Detail		Reload			
Job ID	750gL000008QJFK	Job Type	Bulk V1	Status	Closed
Submitted By	<u>Kim Lois Sangil</u>	Operation	Insert	Total Processing Time (ms)	201
Start Time	7/15/2025, 2:16 AM PST	Queued Batches	0	API Active Processing Time (ms)	113
End Time	7/15/2025, 2:16 AM PST	In Progress Batches	0	Apex Processing Time (ms)	0
Time to Complete ([hh:]mm:ss)	00:00	Completed Batches	1		
Object	Employee	Failed Batches	0		
External ID Field		Progress	100%		
Content Type	CSV	Records Processed	20		
Concurrency Mode	Parallel	Records Failed	0		
API Version	64.0	Retries	0		

## **Phase 5: Deployment, Documentation & Maintenance**

### **Deployment Strategy:**

Deployment was done directly within the Salesforce Developer Org, as the system was produced as a capstone project. In a real-world scenario, deployment should involve the use of Change Sets, ANT Migration Tool, or SFDX depending on the complexity of the changes and the environments involved.

### **System Maintenance and Monitoring may include:**

- Regular review and updates of validation rules, picklist values and flows.
- Monitoring of 'Scheduled Jobs' and error logs through the use of Apex debug logs and flow error emails.
- Keeping roles, profiles, and permissions up-to-date and aligned with any team changes or business process updates.
- Periodic testing of automations to ensure integrity post-data imports or any field changes.

### **Troubleshooting Approach:**

1. Reviewing debug logs for apex and other flow errors.
2. Testing of record creation to reproduce issues
3. Verifying if validation rules are functional when record save errors occur.
4. Isolating processes to identify what's causing errors.
5. Documenting issues especially in test cases and developing improvements.

## CONCLUSION

The capstone project for Tours and Travels CRM Application is a success, as goals and business requirements were met, core operations such as booking management, customer handling, employee coordination, and travel package management were fulfilled and fully operational. By utilizing Salesforce's platform capabilities, namely, custom objects, flows, validation rules, approval processes, and automation; the capstone project shows how CRM can enhance the operational efficiency and data integrity of a travel-based business.

Throughout the phases of requirement gathering, system design, implementation, testing, and data migration, each individual feature was built with all knowledge acquired from the internship program.

Now, the Travels & Tours CRM is capable of:

- Handling end-to-end booking and payment workflows automatically
- Managing employee and customer records with standardized access control.
- Establishing approval processes and error prevention along with validation rules
- Providing business insights through the use of reports and dashboards.

With this project, I have not only fulfilled academic requirements, but also enforced all processes and nuances learned from discussions, modules and trailmixes. I was able to test my knowledge and further my skills while hoping to raise my chances of landing a job in fields that include developing Salesforce-based CRM for a better future and career.