

# Hands-on Admin Workshop

Vancouver

June 2017 - Summer '17 Release

# Introduction and Setup

Welcome to the Salesforce Hands-on Admin Workshop! This guide will walk through all the modules covered in the guided classroom setting, includes extra credit activities, and will be valuable as a take-home activity for quick reference on administrative tasks.

The modules included in this guide will utilize the Salesforce platform (App Cloud) to build a **camp management application**. Administrators will work in the Lightning User Experience to build and manage the app, learning how to create the right data model, apply logic and automation, as well as build a user interface that makes camp management an engaging experience.

## *Prerequisites*

- No prior knowledge of Salesforce is required!
- To do this workshop, all you need is a modern browser and an Internet connection.
- Each student should have their own computer (a tablet may not work for all sections)
- An iPhone or Android phone is desirable, but not necessary

## *Browser Requirements*

The following browsers are supported when working in the lightning experience (all at current version):

- Google Chrome (preferred)
- Mozilla Firefox
- Apple Safari
- Microsoft Edge
- Microsoft Internet Explorer (minimum version 11)

## *Module Order*

This workshop guide is written to be completed in sequential order. Skipping modules may prevent completion if parts of the data model or logic are not completed. Any activities that are marked as **Extra Credit** can be skipped without impacting the remaining modules.

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# Module A: Setting Up a Developer Account

This module will guide you through creating a Developer Edition account, and setting it up before building your application. Developer Edition instances are full-feature Salesforce environments that allow administrators and developers a playground to learn new skills, test their ideas, and develop in isolation from their main Salesforce environment.

**✗ Do not use your company's Salesforce environment for this workshop.**

In addition to this workshop, you can use your Developer Edition account to access Trailhead, Salesforce's interactive and hands-on learning management website. Check out all the great things you can learn at <https://trailhead.salesforce.com/>. If you already have a Trailhead account, you can associate this new developer account to continue to accumulate badges.

## *Activity 1: Create a Developer Edition Account*

1. Open a browser and navigate to <http://developer.salesforce.com/signup>
2. Fill in the form provided:
3. Enter your first and last name
4. Use an email address that you have access to at this time, as this will be used to verify your account
5. Create a username – IMPORTANT: This username needs to be in the format of an email, but must be unique. For this workshop, use the format: **[firstname.lastname@workshop.hoaw](#)**
6. Check the box that you accept the Master Services Agreement
7. Check your email – you will receive an email from Salesforce asking you to verify your account
8. Upon verifying from the email link, you will be asked to create a password for this account. Once complete you should land on the setup page of Salesforce

*Write down your username and password for this workshop:*

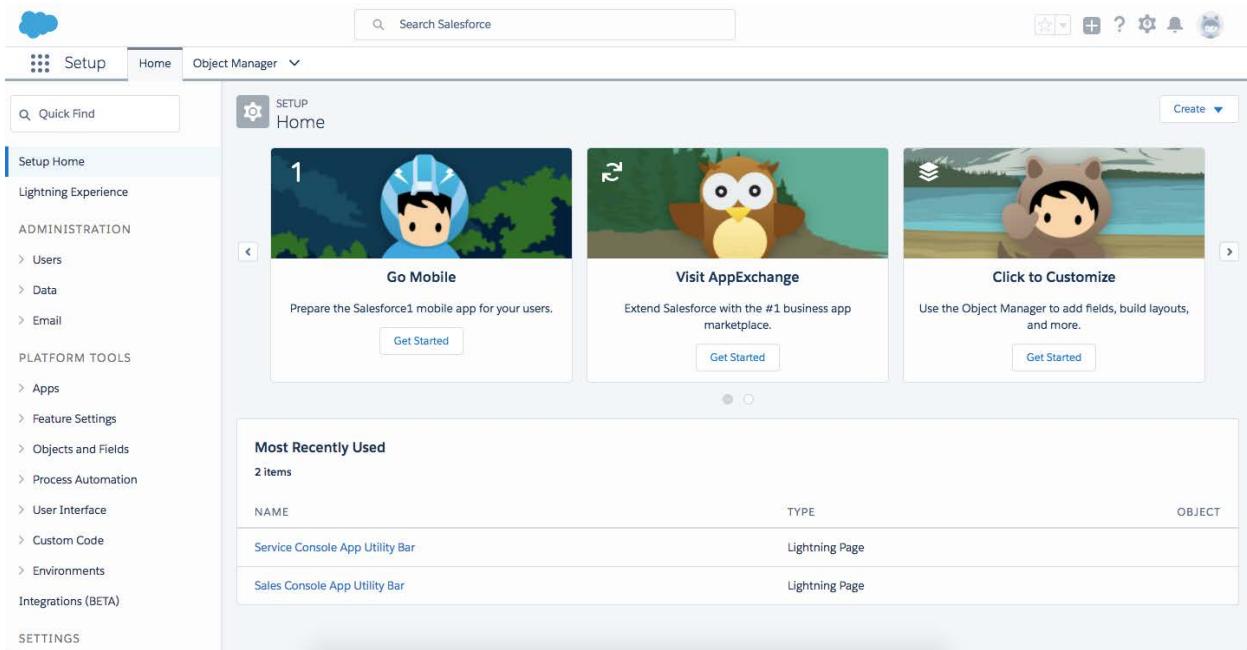
Username: \_\_\_\_\_

Password (optional): \_\_\_\_\_

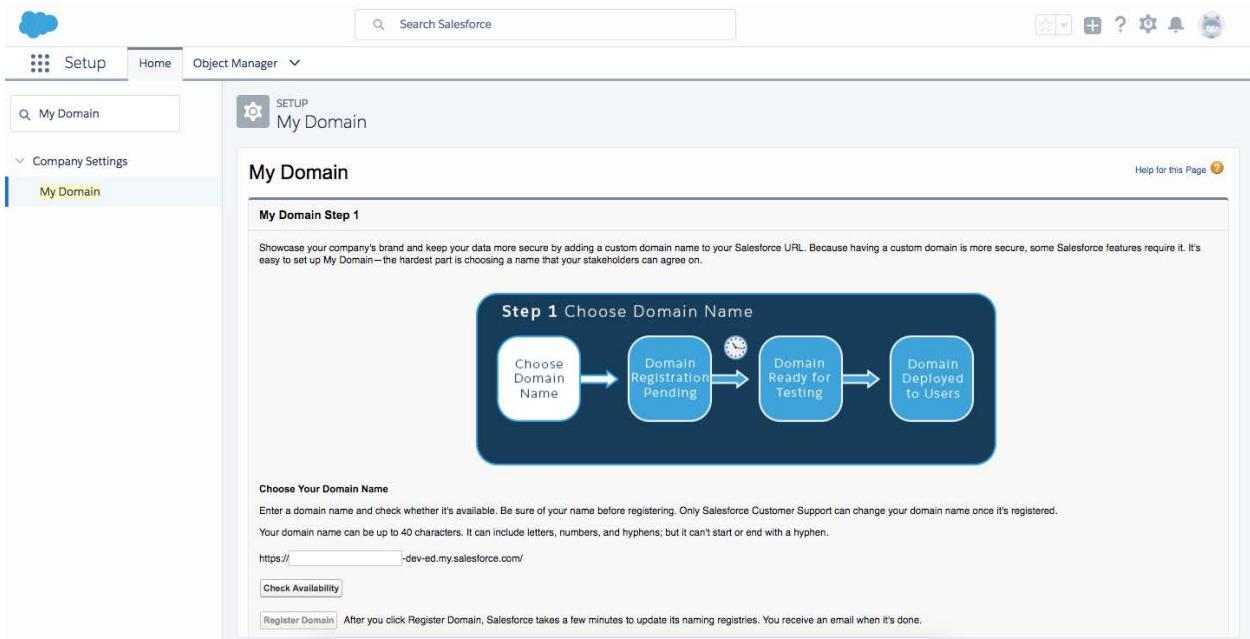
Congratulations, you have now created a Salesforce Developer Edition account! You will hear this referred to as an “org”, “instance”, and “environment”, all meaning the same thing – your personal Salesforce playground! You will have access to this whenever you need, so long as there has been activity in the last six months. More information can be found at [https://developer.salesforce.com/page/Developer\\_Edition](https://developer.salesforce.com/page/Developer_Edition).

## Activity 2: Setting Your Domain

The first activity that you will do in your Salesforce org is setup the domain. With the Lightning Experience, Salesforce works best when given its own nickname. Let's start on your setup screen:



1. In the Quick Find search in the left navigation, start searching for My Domain, and select the menu link



2. For this workshop, use the format **firstname-lastname-hoaw**. Check that your domain name is available, and click Register Domain

3. The domain will take a few minutes to register. In the meantime, check out these awesome resources:
  - 3.1. Trailhead – <https://trailhead.salesforce.com>
  - 3.2. Salesforce Admin Community – <https://admin.salesforce.com>
  - 3.3. Salesforce User Groups – <https://success.salesforce.com/featuredGroups>
4. Refresh your browser and the domain setup will be in Step 3. Click on the Log In button (Note: if Salesforce asks to Register your Mobile Number, click I Don't Want to Register My Phone)
5. Now that your screen has refreshed, you will notice your URL in your browser shows the domain you have created. Look on the page for the button Deploy to Users, and click it
6. Finally, click on the Setup button at the top of the page, and this will return you to the screen you started on

Awesome, you are now ready to start building your camp management application. An application or **App** in Salesforce is comprised of a **data model, logic and automation, user interface, and reporting**.

To support the workshop today, Salesforce has created a few resources to help you out. You will be able to find them on the GitHub page <https://github.com/SalesforceCA/HOAW>. Open up the link and have open in your browser as you continue through the modules.

## Module B: Creating the Data Model

Before you get started in building your data model, let's tackle a few concepts. Think about all the data that surrounds a camp:

- Who are the campers that are attending? Who is organizing the camp? What activities are available?
- What details about a camp need to be tracked and updated?
- Who needs access to this information? How will they use it? How should they see it?

All these questions are rooted in how you set up your data model. That is why it is your first step in building your camp management application.

In Salesforce, you should think about data in three key structures: Objects, Fields, and Records. Consider the following statement:

*We want to track campers attending our camp, including their age, email, guardian, and allergies.*

**Objects** – Salesforce uses objects to contain all information related to a subject. In the above statement, the subject is a **Camper**. All campers have similar attributes, and can be collected together and stored within that object in Salesforce.

**Fields** – Salesforce uses fields to define the attributes and details about a subject. In the above statement, this would be **age, email, guardian, and allergies**. These attributes would be fields on the Camper object.

**Records** – Salesforce uses records to identify instances of an object. Every camper might have a different combination of attributes, but would all be records in the Camper object.

Thought more commonly as a spreadsheet, an object is a table, fields are the columns in that table, and records are each row that is added to the table. This means that you can move any existing spreadsheet into Salesforce by creating the right data model to support it!

Now before you build a data model from scratch, it is always smart to see if someone has already built it. The Salesforce AppExchange is a marketplace of pre-built apps that can fit right into your Salesforce org, and get going towards your goal. Check out the AppExchange at <https://appexchange.salesforce.com/>.

## Let's Get Started!

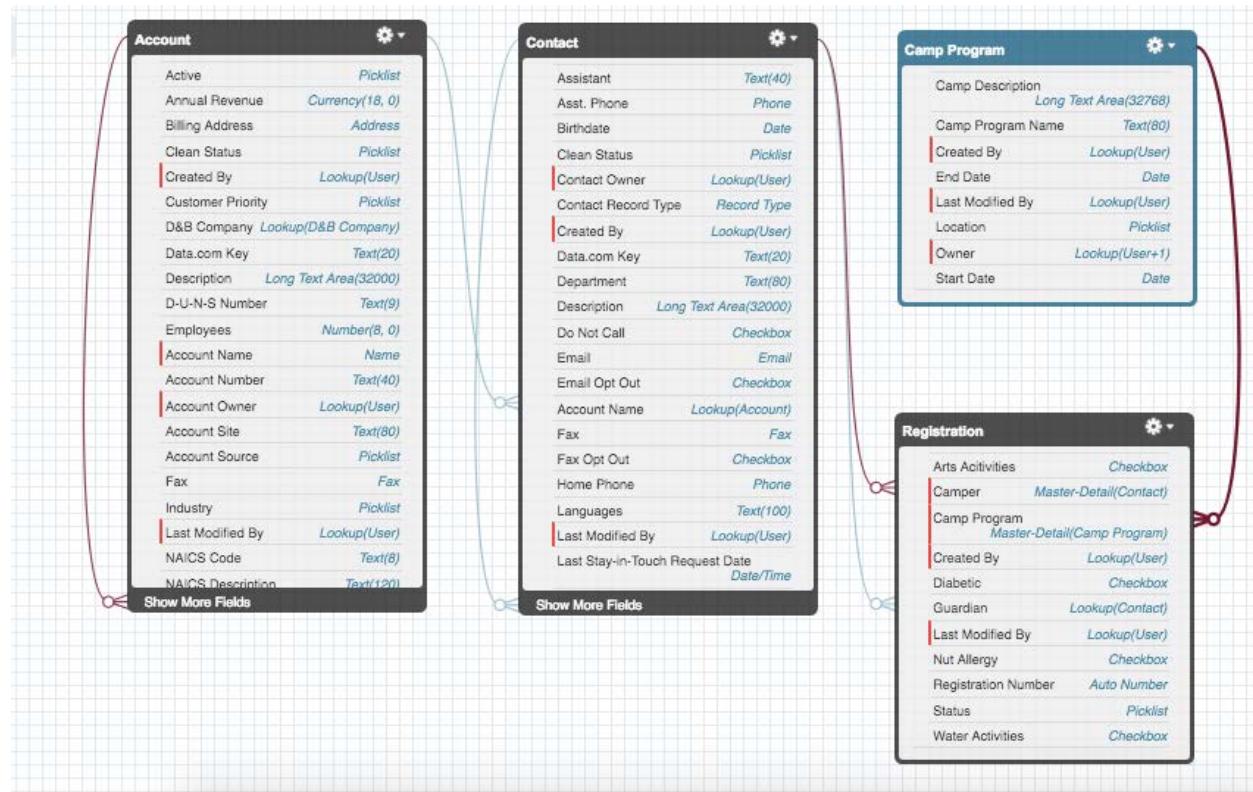
Before you start building your data model, you will want to start with the end in mind – what insights will you get from the data. Camp managers have been asking for three key insights:

1. Staff Planning – how should the camp make hiring decisions based on the campers registered?
2. Supply Planning – how many supplies are needed to support camp activities?
3. Safety – who are the key campers that camp managers should keep an eye on?

Additionally, camp managers have been asking for a more automated process for handling campers with nut allergies. You will want to help with this objective as well!

The following image shows the objects and fields that you are going to use today:

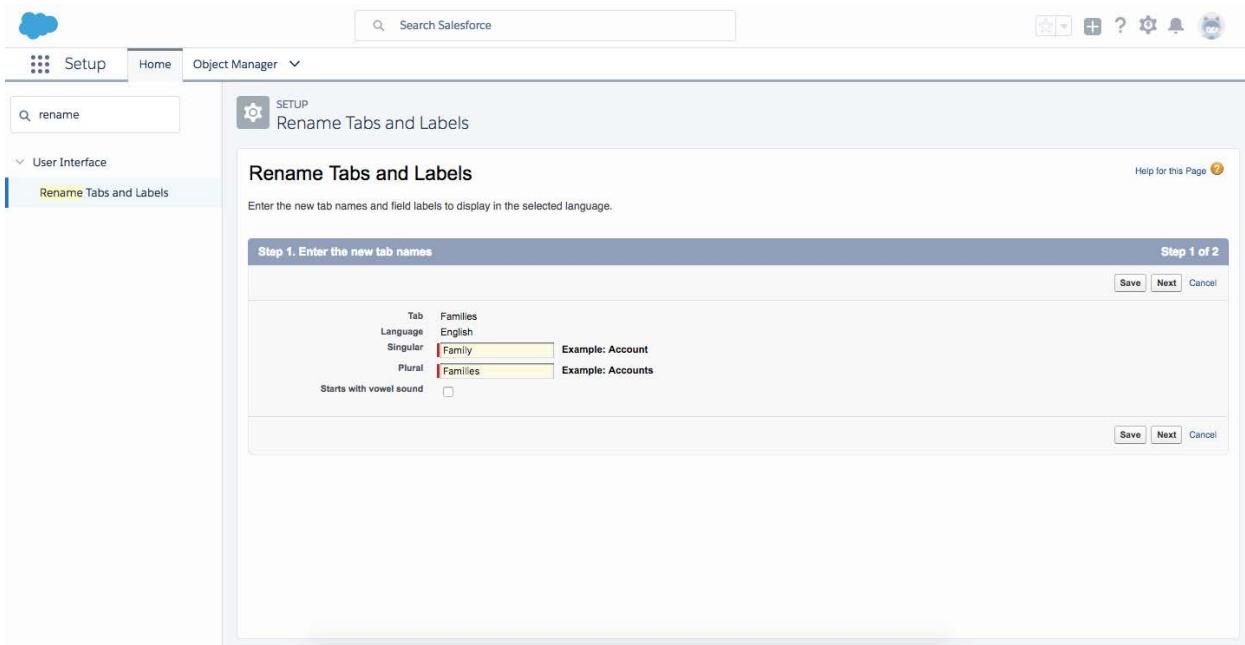
- First, you are going to have **Contacts** to track your campers and their guardians
- Contacts belonging to the same family will be connected through a relationship with an **Account**
- As a camp will run multiple times per summer, you will track your **Camp Programs**
- The campers will be connected with a **Registration** to a specific Camp Program



## Activity 1: Modify the Account and Contact objects

Starting on your setup screen, you are going to first change the standard label for Account to Family. This will ensure that users of the application see the right information relevant to their use case.

1. In the Quick Find search in the left navigation, start searching for **Rename**, and select the menu link for **Rename Tabs and Labels**
2. Click on the **Edit** button beside the Accounts row
3. Rename the singular name to **Family**
4. Rename the plural name to **Families**
5. Deselect the checkbox for **Starts with vowel sound**



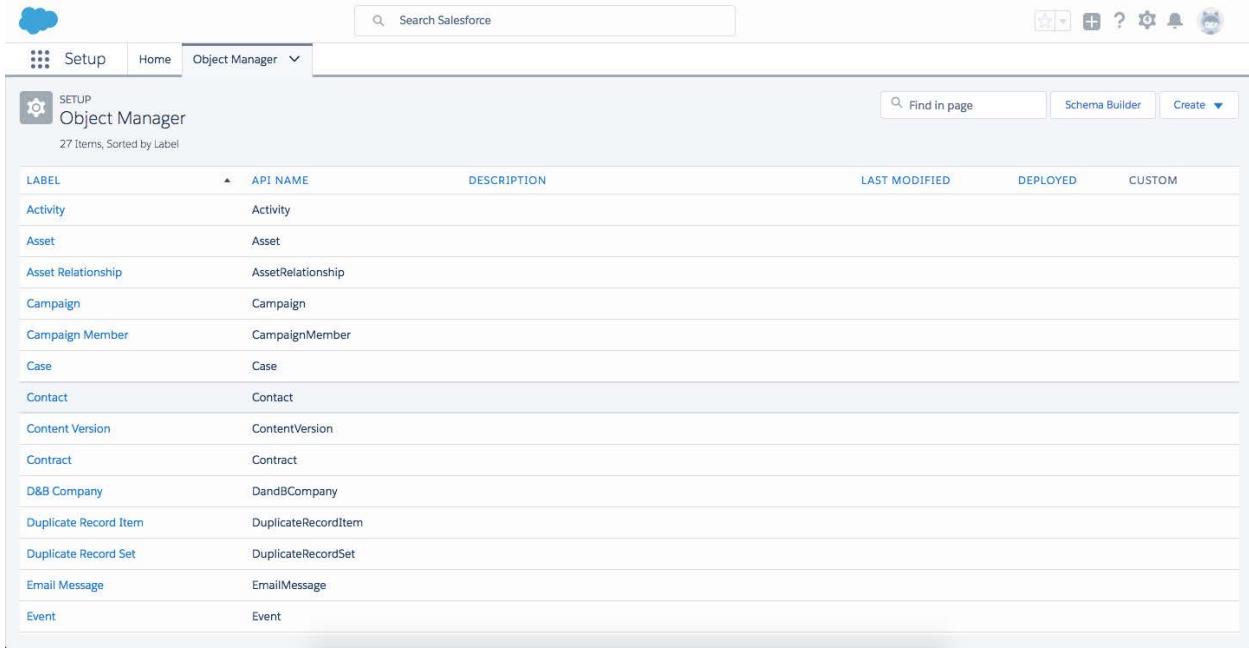
The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar says 'Search Salesforce'. On the left, a sidebar has 'User Interface' expanded, with 'Rename Tabs and Labels' selected. The main content area is titled 'Rename Tabs and Labels' and contains a sub-section 'Step 1. Enter the new tab names'. It shows the configuration for the 'Account' object: Tab is 'Families', Language is 'English', Singular is 'Family' (highlighted in yellow), and Plural is 'Families' (highlighted in yellow). An example for 'Account' is shown as 'Example: Account'. Below this, there is a checkbox 'Starts with vowel sound' which is unchecked. At the bottom of the step, there are 'Save', 'Next', and 'Cancel' buttons.

6. Click **Next** to see that all fields related to Account have changed to Family
7. Click **Save**

You have now changed the label of the Account object to be Family! Now let's modify your Contact object to track both Campers and Guardians. To do this, you are going to create **record types** for this object.

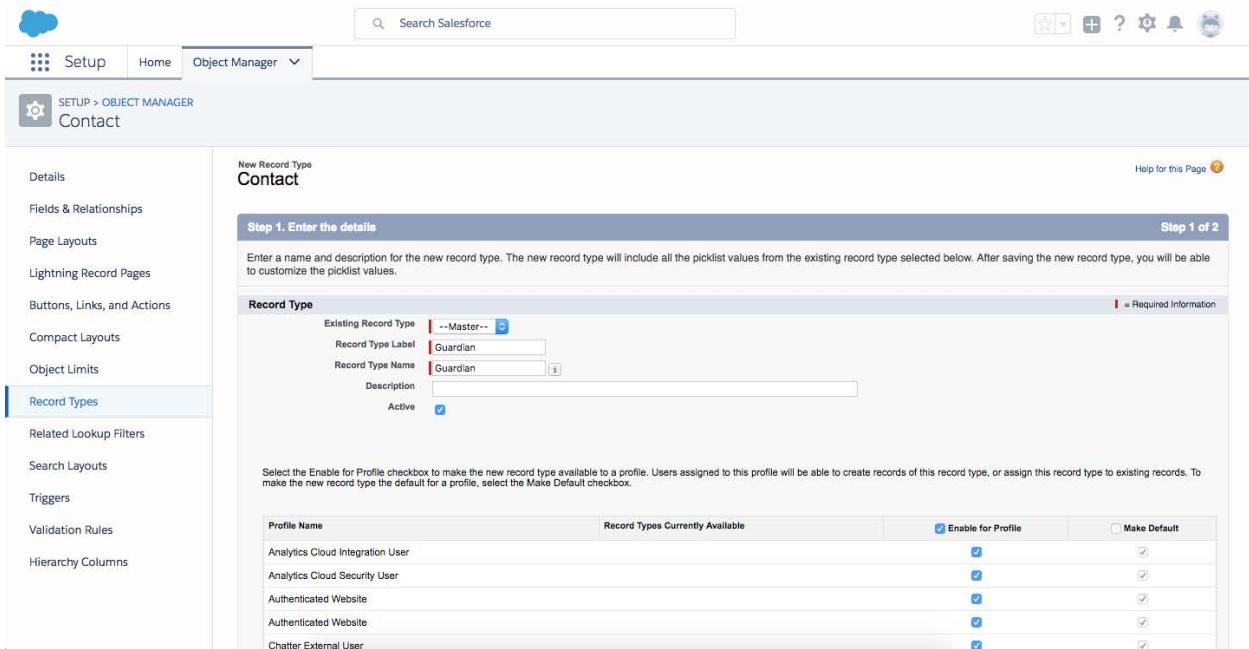
A record type allows us to use the same Salesforce object for different purposes. You may track different attributes about a guardian than you would a camper, but still maintain some common attributes. Instead of creating a custom object for both, record types allow you to use the same object, and assign different page layouts, different processes, and even different picklist values to each.

1. Click on the **Object Manager** tab at the top of the screen
2. Within Object Manager, find the **Contact** object, and click on the label link



The screenshot shows the Salesforce Object Manager page. At the top, there are navigation links for Setup, Home, and Object Manager. A search bar is at the top right. Below the header, it says "Object Manager" and "27 Items, Sorted by Label". There is a table with columns: LABEL, API NAME, DESCRIPTION, LAST MODIFIED, DEPLOYED, and CUSTOM. The table lists various standard objects like Activity, Asset, Asset Relationship, Campaign, etc.

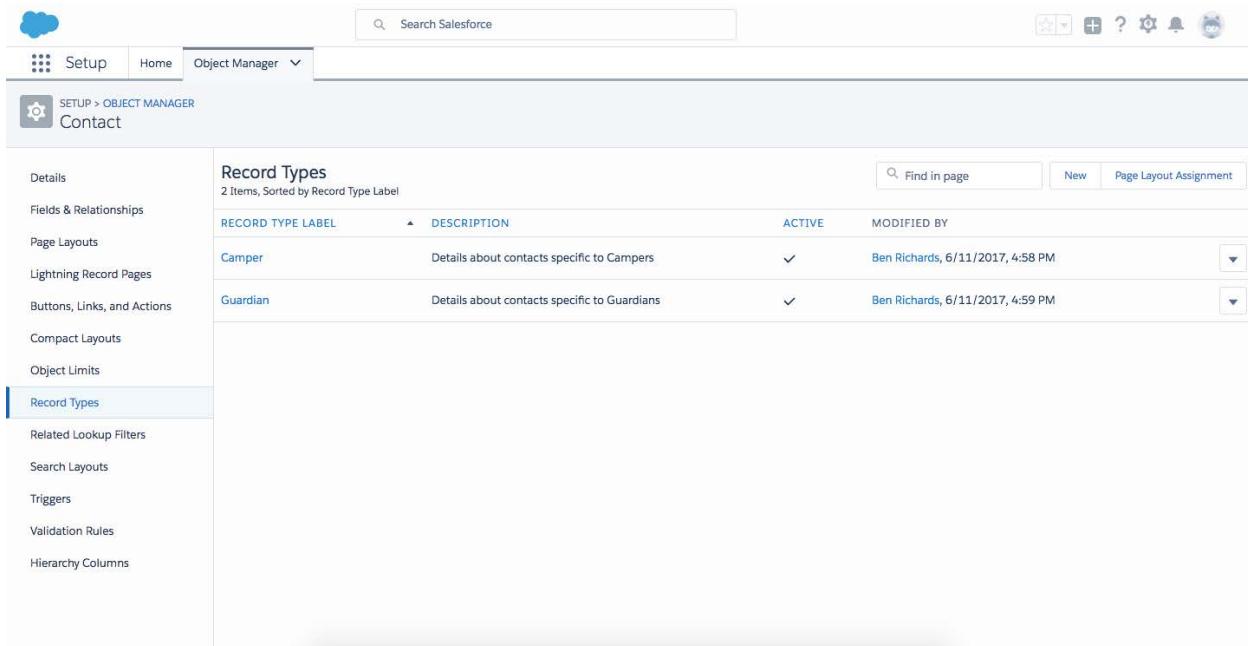
3. In the left navigation, click on the menu item **Record Types**
4. Click the **New** button
5. Set the label to **Guardian** and hit the tab key
6. The name field should autofill. If it doesn't, set the name to **Guardian**
7. Confirm the checkbox for **Active** is selected, and that the record type is enabled for all profiles



The screenshot shows the "New Record Type" page for "Contact". The left sidebar has a "Record Types" section selected. The main area is titled "Step 1. Enter the details." It shows fields for "Record Type Label" (Guardian) and "Record Type Name" (Guardian). The "Active" checkbox is checked. Below this, a note says "Select the Enable for Profile checkbox to make the new record type available to a profile. Users assigned to this profile will be able to create records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select the Make Default checkbox." A table below lists profiles and their settings for the new record type.

8. At the bottom of the page, click **Next**
9. Set the page layout for this record type to **Contact Page Layout**
10. At the bottom of the page, select **Save and New**

11. Repeat to create a record type for Camper
12. Set the label to **Camper** and hit the tab key
13. The name field should autofill. If it doesn't, set the name to **Camper**
14. Click the checkbox to **Activate** this record type
15. Click the checkbox in table's header to **Enable for Profile**. This will select all the profiles
16. At the bottom of the page, click **Next**
17. Set the page layout for this record type to **Contact Page Layout**
18. At the bottom of the page, select **Save**
19. In the left navigation, click on the menu item **Record Types**. You should now see both record types created and active



The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Record Types' section selected. The main area displays a table titled 'Record Types' with two items: 'Camper' and 'Guardian'. The 'Camper' record is active and modified by Ben Richards on 6/11/2017 at 4:58 PM. The 'Guardian' record is also active and modified by Ben Richards on 6/11/2017 at 4:59 PM.

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY
Camper	Details about contacts specific to Campers	✓	Ben Richards, 6/11/2017, 4:58 PM
Guardian	Details about contacts specific to Guardians	✓	Ben Richards, 6/11/2017, 4:59 PM

Now that you have modified the Account and Contact objects for use in your application, it is time to build a few custom objects to track information about the camp programs and registrations.

You may be asking, why did you use the account and contact objects instead of creating custom objects? Savvy Salesforce administrators will try to use standard functionality and objects as much as possible. It saves time from rebuilding a data model from scratch. For example, there is an existing relationship between accounts and contacts, meaning that a Camper and a Guardian can belong to a Family. If you build this with custom objects, you would also have to rebuild this standard relationship, and the security model that surrounds it.

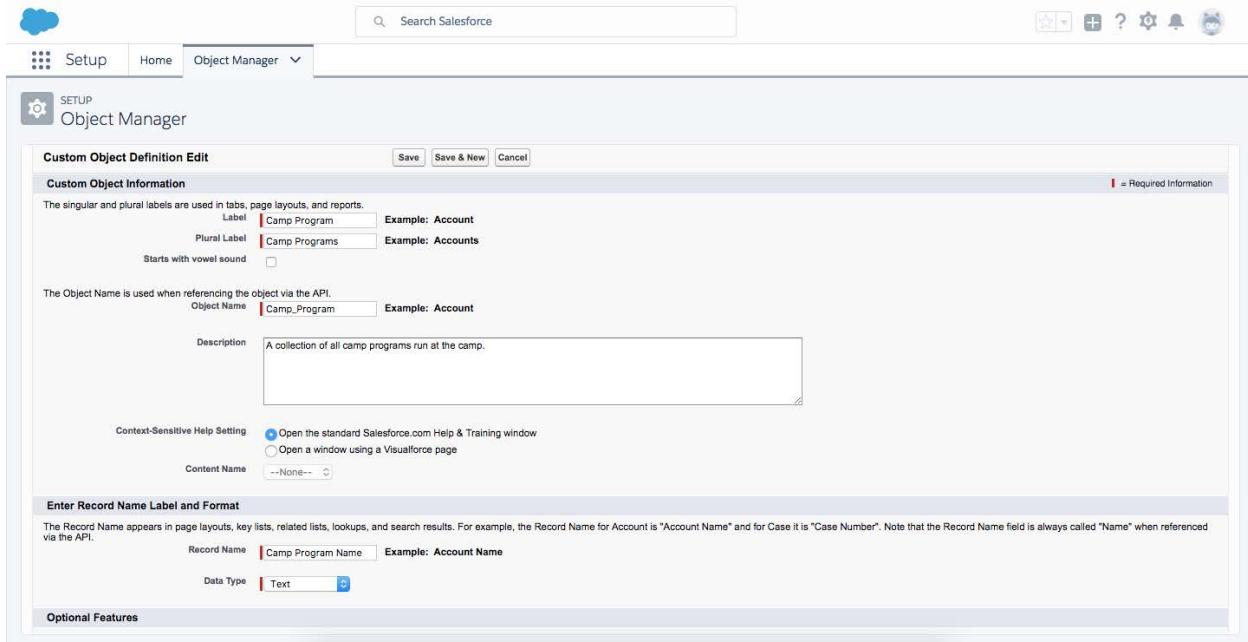
## Activity 2: Create a Camp Program Object and Tab

When thinking about your camp management application, you will want to think about dependencies. For example, camp registrations require us to know what camp program it is related to. If you haven't created a camp program, you can't create the registration. The same concept applies when designing the data model. You need to build your Camp Program object before your Registrations object, so it exists when you want to create a relationship.

1. Click on the **Object Manager** tab at the top of the screen

## 2. Click on Create and Custom Object

- 2.1. Set the custom object label to **Camp Program** and hit the tab key
- 2.2. Set the plural label to **Camp Programs**
- 2.3. Set the record name to **Camp Program Name**, with data type **Text**



**Custom Object Definition Edit**

**Custom Object Information**

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

Label	<input type="text" value="Camp Program"/>	Example: Account
Plural Label	<input type="text" value="Camp Programs"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

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

Object Name	<input type="text" value="Camp_Program"/>	Example: Account
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Description

A collection of all camp programs run at the camp.

Context-Sensitive Help Setting

Open the standard Salesforce.com Help & Training window  
 Open a window using a Visualforce page

Content Name

--None--

**Enter Record Name Label and Format**

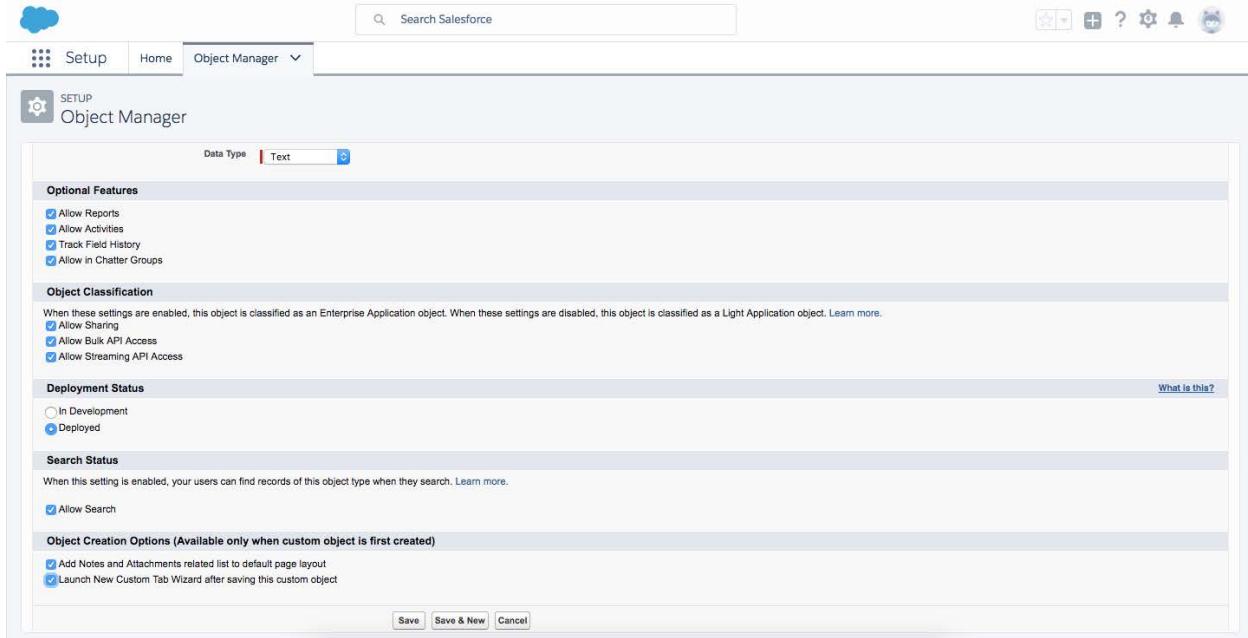
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Camp Program Name"/>	Example: Account Name
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Data Type

**Optional Features**

- 2.4. Click all the checkboxes in each section **Optional Features**, **Search Status**, and **Object Creation Options**



**Optional Features**

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

**Deployment Status**

In Development  
 Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

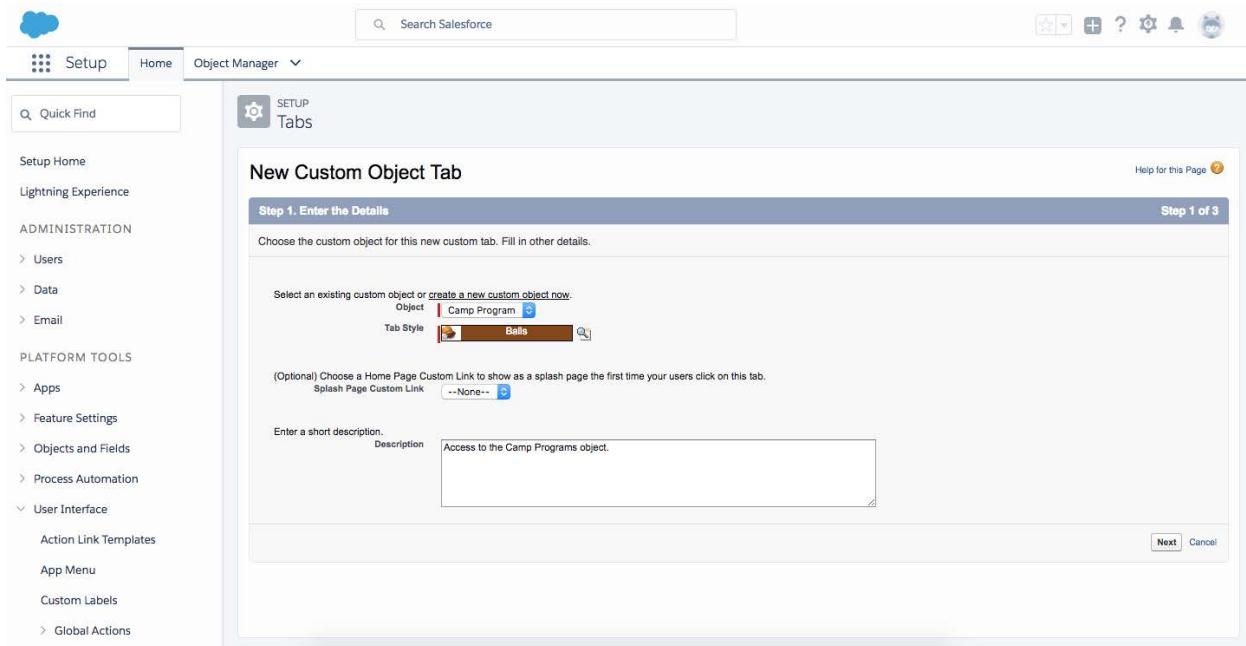
**Object Creation Options (Available only when custom object is first created)**

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

**IMPORTANT:** Ensure that you have the **Launch New Custom Tab Wizard** checkbox clicked

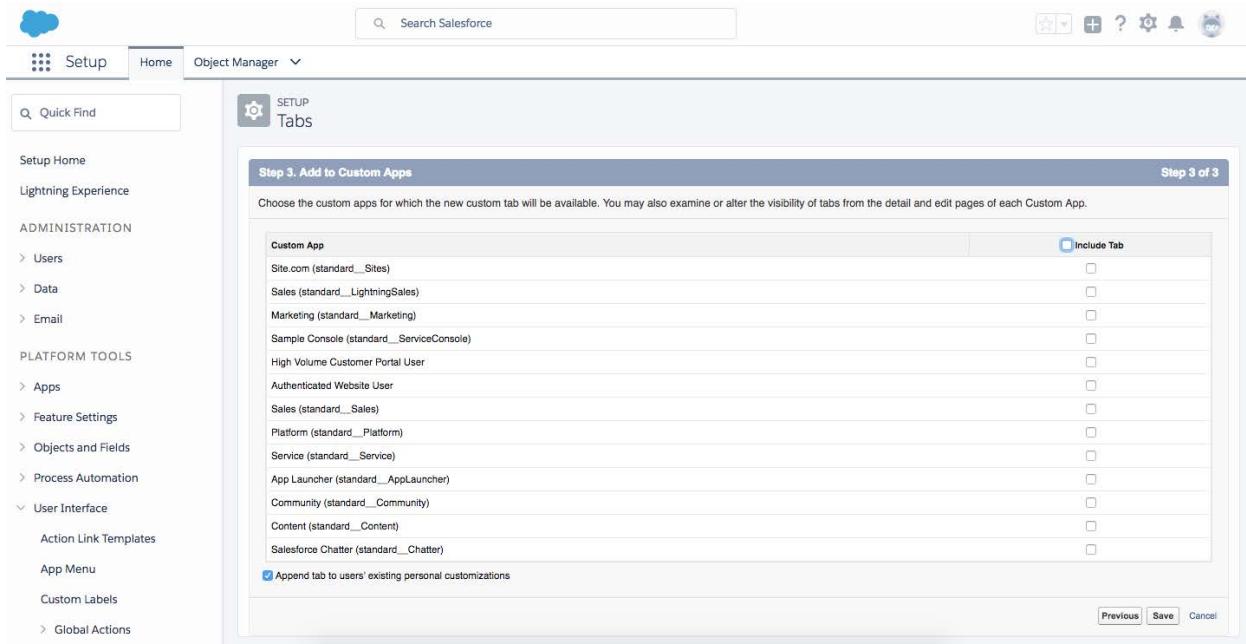
## 2.5. Click Save

3. Choose a Tab Style that fits best for your camp. This will be used as the icon to represent your object to end users



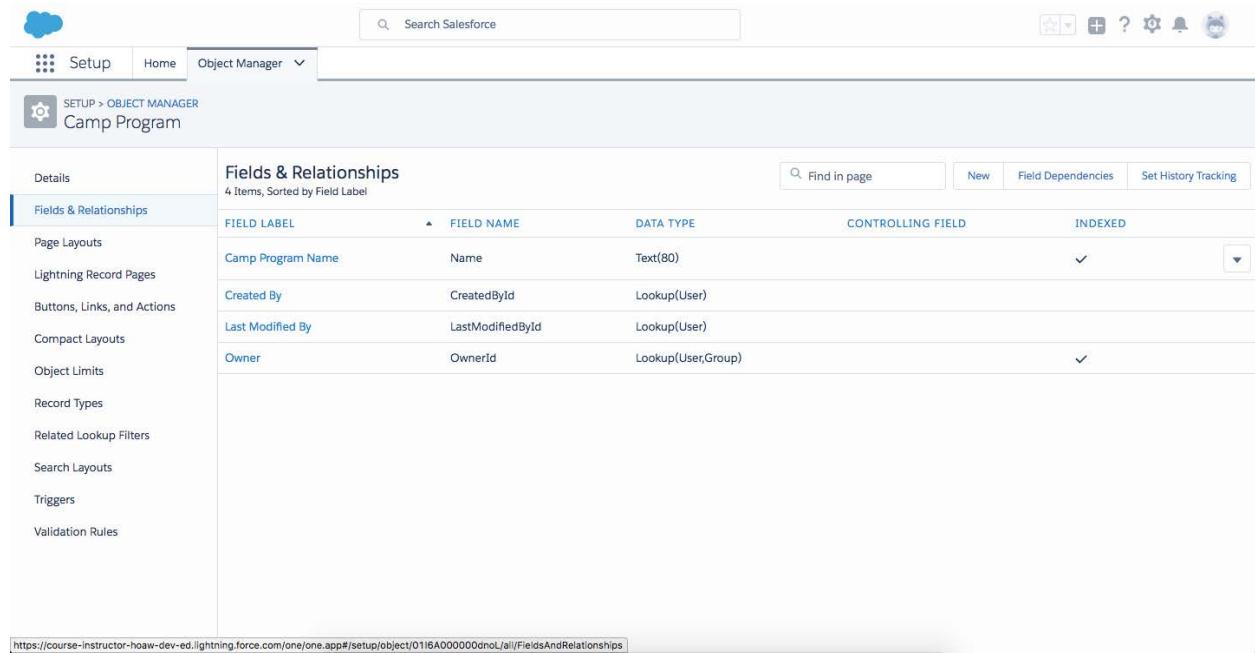
4. Confirm the tab is **Default On** for all profiles, and click **Next**

5. Deselect the checkbox in the table header for **Include Tab**. You do not want to add this object and tab to existing apps in Salesforce, as you are building a new app.



6. Click **Save**

You have now created the object for Camp Programs! However, it was only created with the standard fields Name, Created By, Last Modified By, and Owner. You need to add some custom fields to this object to track the attributes that are specific to your camp.

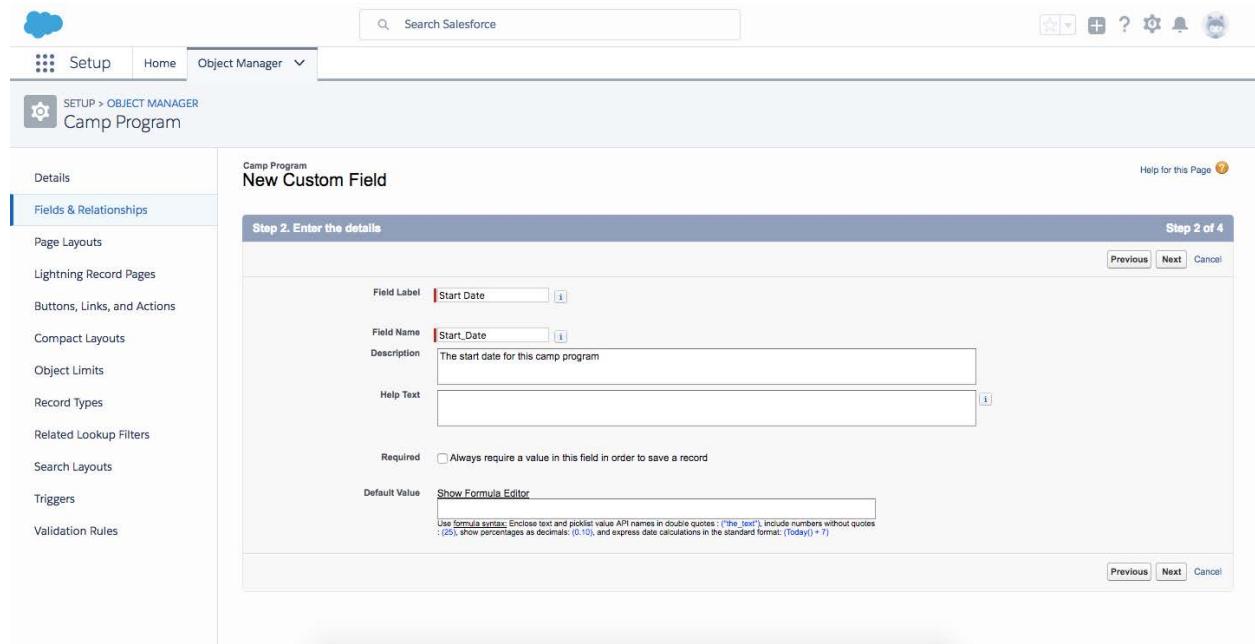


The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with four items. The columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Camp Program Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

<https://course-instructor-hoaw-dev-ed.lightning.force.com/one/one.app#/setup/object/01l6A00000dnOL/all/FieldsAndRelationships>

1. In the left navigation, click on the menu item **Fields and Relationships**
2. Click on the **New** button to create a new custom field
3. Create a Camp Start Date field
  - 3.1. Select the Data Type **Date**
  - 3.2. Set the label to **Start Date**
  - 3.3. Set the name to **Start\_Date**

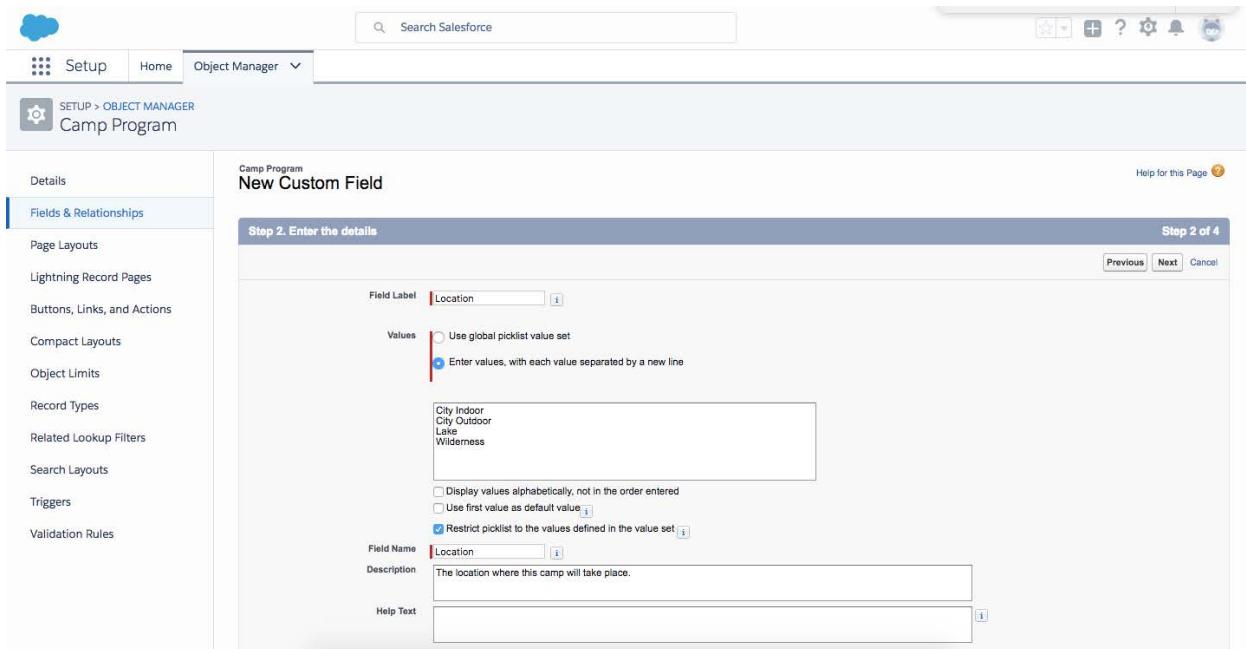


The screenshot shows the 'New Custom Field' creation wizard, Step 2: Enter the details. The left sidebar has 'Fields & Relationships' selected. The main area has a title 'Camp Program New Custom Field' and a sub-section 'Step 2. Enter the details.' The form fields are:

- Field Label: Start Date
- Field Name: Start\_Date
- Description: The start date for this camp program
- Help Text: (empty)
- Required:  Always require a value in this field in order to save a record
- Default Value: Show Formula Editor  
Use formula syntax: Enclose text and picklist values API names in double quotes ("the\_text"), include numbers without quotes (20), show percentages as decimals (.10), and express date calculations in the standard format: (today)+7

Buttons at the bottom right: Previous, Next, Cancel

- 3.4. Click **Next**
- 3.5. Review the profiles who will be able to see this field and click **Next**
- 3.6. Confirm the field will be added to the **Camp Program Layout**, and click **Save and New**
4. Create a Camp End Date field
  - 4.1. Select the Data Type **Date**
  - 4.2. Set the label to **End Date**
  - 4.3. Set the name to **End\_Date**
  - 4.4. Click **Next**
  - 4.5. Review the profiles who will be able to see this field and click **Next**
  - 4.6. Confirm the field will be added to the **Camp Program Layout**, and click **Save and New**
5. Create a Location field
  - 5.1. Select the Data Type **Picklist**
  - 5.2. Set the label to **Location**
  - 5.3. Select the radio button for Enter values, with each value separated by a new line
  - 5.4. Enter the following values (each on its own row)
    - 5.4.1. City Indoor
    - 5.4.2. City Outdoor
    - 5.4.3. Lake
    - 5.4.4. Wilderness
  - 5.5. Set the name to **Location**



The screenshot shows the Salesforce setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The left sidebar lists various setup categories like 'Fields & Relationships' (which is selected), 'Page Layouts', 'Lightning Record Pages', etc. The main content area is titled 'Camp Program New Custom Field' and 'Step 2. Enter the details'. It shows the following configuration:

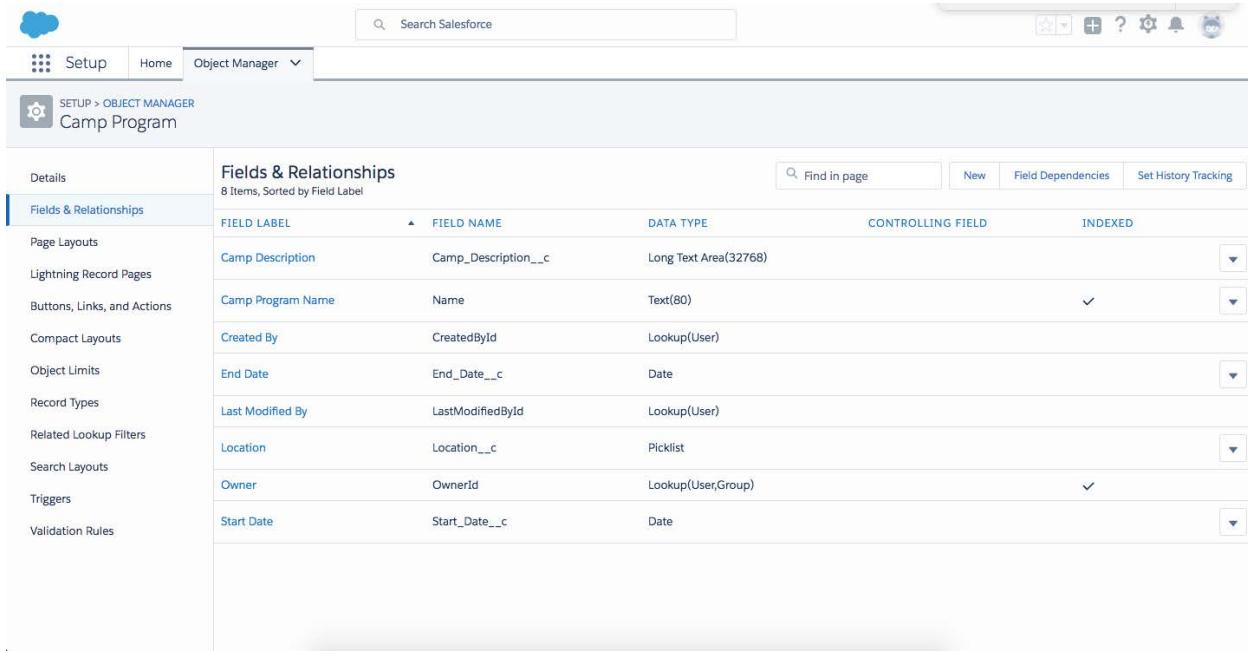
- Field Label:** Location
- Values:** Radio button selected for 'Enter values, with each value separated by a new line'. A list box contains the values: City Indoor, City Outdoor, Lake, and Wilderness.
- Field Name:** Location
- Description:** The location where this camp will take place.
- Help Text:** (empty)

At the bottom right, there are buttons for 'Previous', 'Next', and 'Cancel'.

- 5.6. Click **Next**
- 5.7. Review the profiles who will be able to see this field and click **Next**
- 5.8. Confirm the field will be added to the **Camp Program Layout**, and click **Save and New**
6. Create a Camp Description field
  - 6.1. Select the Data Type **Text Area (Long)**
  - 6.2. Set the label to **Camp Description**
  - 6.3. Set the visible lines to 3
  - 6.4. Set the name to **Camp\_Description**
  - 6.5. Click **Next**

- 6.6. Review the profiles who will be able to see this field and click **Next**
- 6.7. Confirm the field will be added to the **Camp Program Layout**, and click **Save**

You have now created the right field set for your camp program. Next step, managing camp registrations!



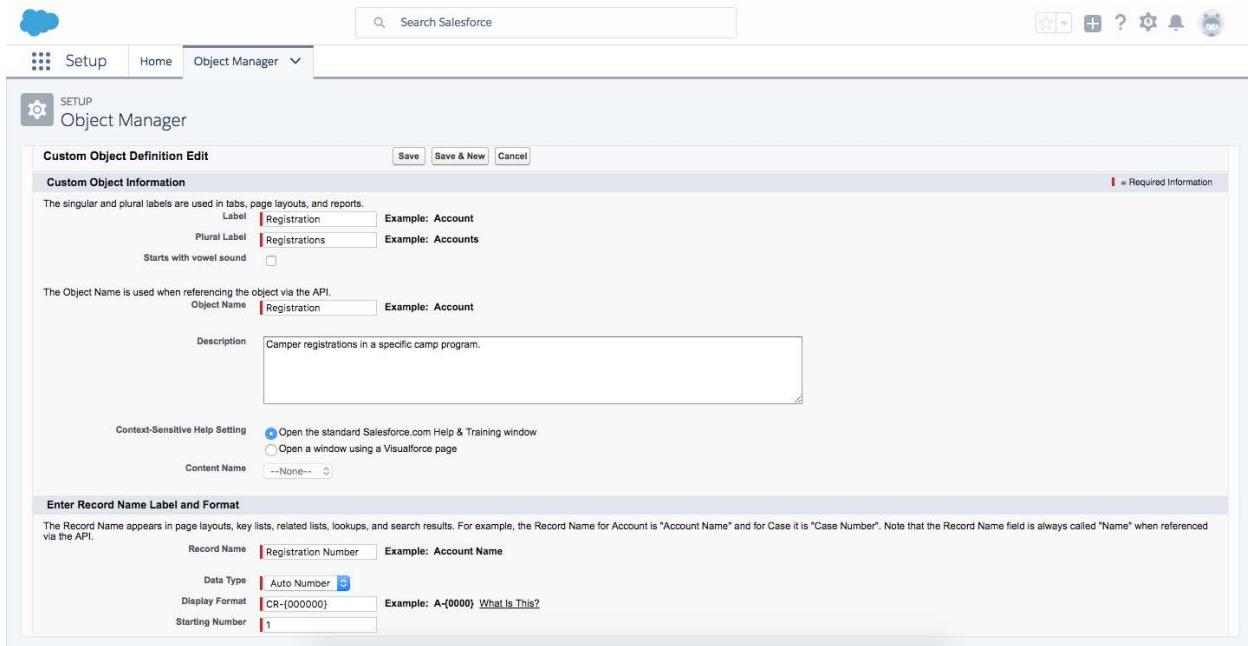
Fields & Relationships				
8 Items, Sorted by Field Label		Find in page	New	Field Dependencies
Camp Description	Camp_Description__c	Long Text Area(32768)		
Camp Program Name	Name	Text(80)	✓	
Created By	CreatedBy	Lookup(User)		
End Date	End_Date__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Picklist		
Owner	OwnerId	Lookup(User,Group)	✓	
Start Date	Start_Date__c	Date		

### Activity 3: Create a Registration Object and Tab

Before jumping in and creating the Registrations object, let's think about how this object will be used. Each registration is the connection between a Camper and a Camp Program. When you define the relationships between these objects, think about the nature of those relationships. Can a camper could be registered in more than one camp program? Should a camp program have more than one registered student? If the answers to both are YES!, then you are creating a junction object, effectively a many-to-many relationship between campers and camp programs.

When thinking about relationships, you also want to think about whether a registration can exist without a camper or a camp program. If the answer is no, then you should create the relationship as master-detail. This means that a registration cannot exist without an assigned camper, and without a specified camp program.

1. Click on the **Object Manager** tab at the top of the screen
2. Click on Create and Custom Object
  - 2.1. Set the custom object label to **Registration** and hit the tab key
  - 2.2. Set the plural label to **Registrations**
  - 2.3. Set the record name to **Registration Number**, with data type **Auto Number**
  - 2.4. Set the display format to **CR-{000000}**
  - 2.5. Set the starting number to **1**



The screenshot shows the 'Custom Object Definition Edit' screen in the Salesforce Setup. At the top, there are tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is selected. Below the tabs is a search bar labeled 'Search Salesforce'. The main area is titled 'Custom Object Information' with a note: 'The singular and plural labels are used in tabs, page layouts, and reports.' There are fields for 'Label' (set to 'Registration') and 'Plural Label' (set to 'Registrations'), both with examples ('Example: Account' and 'Example: Accounts'). A checkbox 'Starts with vowel sound' is unchecked. Below this is a section for 'The Object Name is used when referencing the object via the API.' It has a field 'Object Name' set to 'Registration' with example 'Account'. A 'Description' field contains the text 'Camper registrations in a specific camp program.' Under 'Context-Sensitive Help Setting', the radio button for 'Open the standard Salesforce.com Help & Training window' is selected. In the 'Enter Record Name Label and Format' section, there are fields for 'Record Name' (set to 'Registration Number') and 'Data Type' (set to 'Auto Number'). The 'Display Format' field shows 'CR-(000000)' with example 'A-000000 What Is This?' and a 'Starting Number' field set to '1'. A note states: 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.'

**2.6.** Click all the checkboxes in each section **Optional Features**, **Search Status**, and **Object Creation Options**

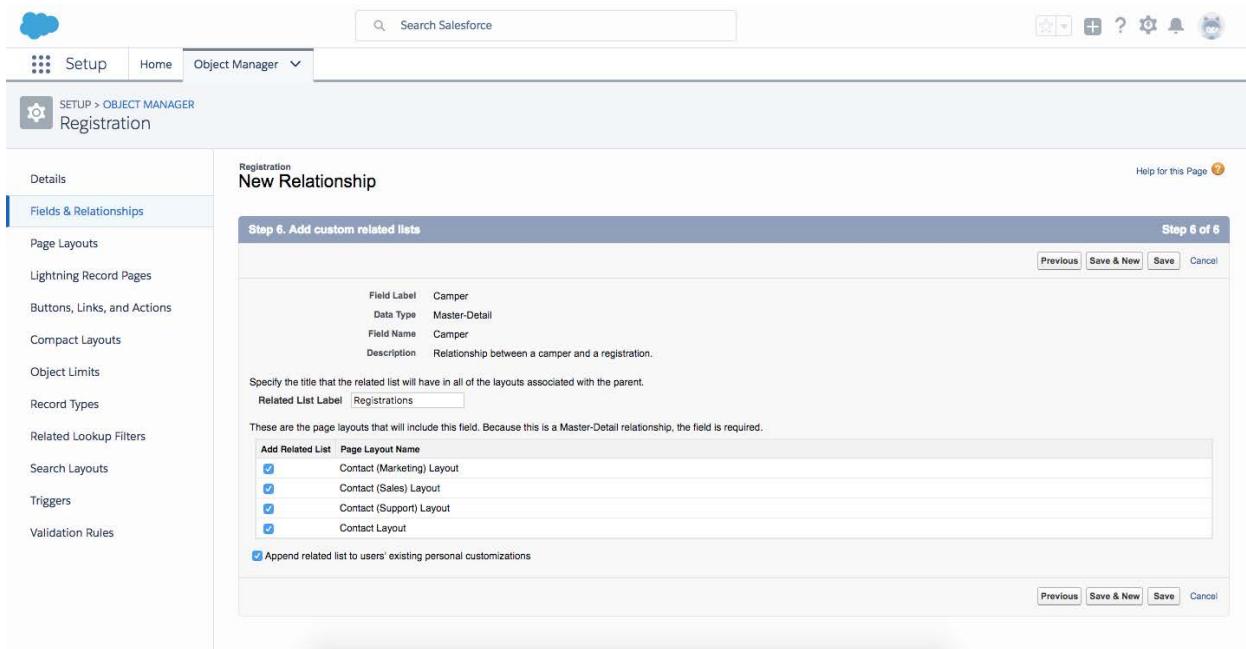
**IMPORTANT:** Ensure that you have the **Launch New Custom Tab Wizard** checkbox clicked

**2.7. Click Save**

3. Choose a **Tab Style** that fits best for your camp. This will be used as the icon to represent your object to end users
4. Confirm the tab is **Default On** for all profiles, and click **Next**
5. Deselect the checkbox in the table header for **Include Tab**. You do not want to add this object and tab to existing apps in Salesforce, as you are building a new app.
6. Click **Save**

When adding fields, let's start with building the right relationships.

1. In the left navigation, click on the menu item **Fields and Relationships**
2. Click on the **New** button to create a new custom field
3. Create a Camper relationship field
  - a. Select the Data Type **Master-Detail Relationship**, and click **Next**
  - b. Select the **Contact** object for Relate To
  - c. Set the label to **Camper**
  - d. Set the name to **Camper**
  - e. Set the child relationship Name to **Registrations**
  - f. Click **Next**
  - g. Review the profiles who will be able to see this field and click **Next**
  - h. Confirm the field will be added to the **Registrations Layout**, and click **Next**
  - i. Set the related list label to **Registrations**, add related list to all layouts, and click **Save and New**



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A specific relationship named 'Camper' is being configured for the 'Registration' object. The configuration details are as follows:

- Field Label:** Camper
- Data Type:** Master-Detail
- Field Name:** Camper
- Description:** Relationship between a camper and a registration.
- Related List Label:** Registrations
- Add Related List:** Page Layout Name
  - Contact (Marketing) Layout
  - Contact (Sales) Layout
  - Contact (Support) Layout
  - Contact Layout
- Append related list to users' existing personal customizations:** Checked

4. Create a Camper relationship field
  - a. Select the Data Type **Master-Detail Relationship**, and click **Next**
  - b. Select the **Camp Program** object for Relate To
  - c. Set the label to **Camp Program**
  - d. Set the name to **Camp Program**
  - e. Set the child relationship Name to **Registrations**
  - f. Click **Next**
  - g. Review the profiles who will be able to see this field and click **Next**
  - h. Confirm the field will be added to the **Registrations Layout**, and click **Next**
  - i. Set the related list label to **Registrations**, add related list to all layouts, and click **Save and New**
5. Create a Camper relationship field
  - a. Select the Data Type **Lookup Relationship**, and click **Next**
  - b. Select the **Contact** object for Relate To
  - c. Set the label to **Guardian**
  - d. Set the name to **Guardian**
  - e. Set the child relationship Name to **Guardianship**
  - f. Click **Next**
  - g. Review the profiles who will be able to see this field and click **Next**
  - h. Confirm the field will be added to the **Registrations Layout**, and click **Next**
  - i. Set the related list label to **Family Registrations**, add related list to all layouts, and click **Save and New**

You have now set up three relationships, including two to the same object. Salesforce allows us to create a maximum of 2 master-detail relationships on an object, and then as many lookup relationships as required. Let's finish the registration object with a few more fields.

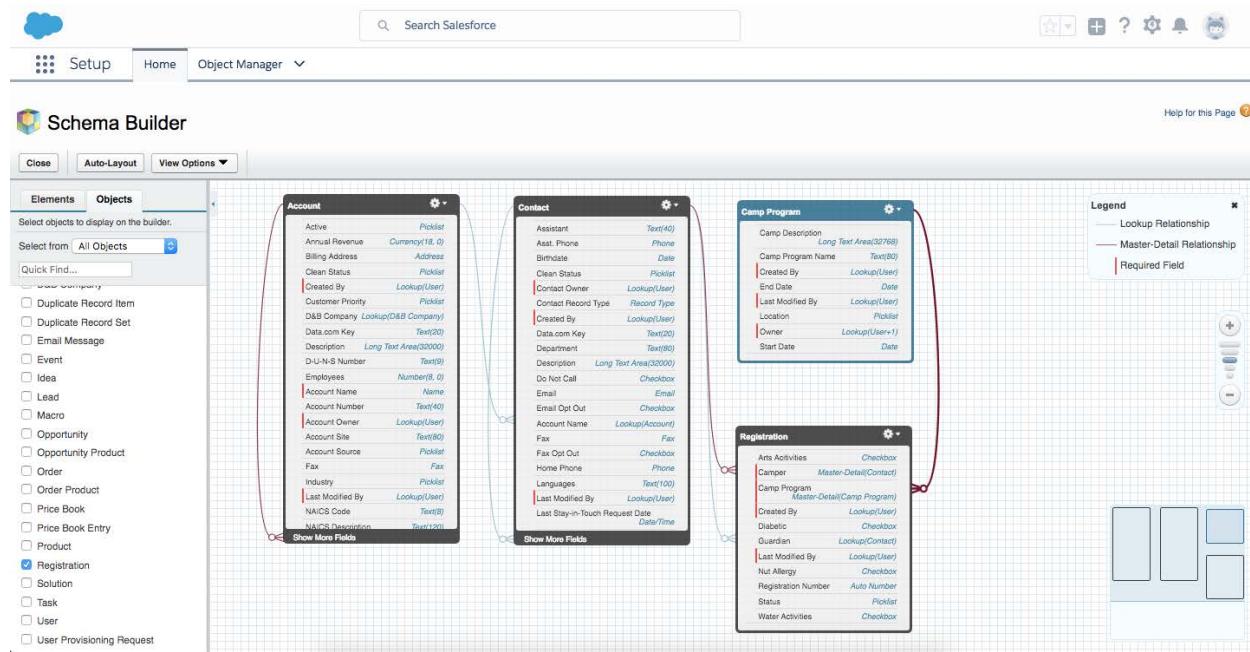
6. Create a Status field
  - 6.1. Select the Data Type **Picklist**
  - 6.2. Set the label to **Status**

- 6.3. Select the radio button for Enter values, with each value separated by a new line
- 6.4. Enter the following values (each on its own row)
  - 6.4.1. Registered
  - 6.4.2. At Camp
  - 6.4.3. Completed
  - 6.4.4. Withdrew
- 6.5. Select the checkbox for Use first value as default value
- 6.6. Set the name to **Status**
- 6.7. Click **Next**
- 6.8. Review the profiles who will be able to see this field and click **Next**
- 6.9. Confirm the field will be added to the **Registration Layout**, and click **Save and New**
7. Create a Nut Allergy field
  - 7.1. Select the Data Type **Checkbox**
  - 7.2. Set the label to **Nut Allergy**
  - 7.3. Set the default value to **Unchecked**
  - 7.4. Set the name to **Nut\_Allergy**
  - 7.5. Click **Next**
  - 7.6. Review the profiles who will be able to see this field and click **Next**
  - 7.7. Confirm the field will be added to the **Registration Layout**, and click **Save and New**
8. Create a Diabetic field
  - 8.1. Select the Data Type **Checkbox**
  - 8.2. Set the label to **Diabetic**
  - 8.3. Set the default value to **Unchecked**
  - 8.4. Set the name to **Diabetic**
  - 8.5. Click **Next**
  - 8.6. Review the profiles who will be able to see this field and click **Next**
  - 8.7. Confirm the field will be added to the **Registration Layout**, and click **Save and New**
9. Create a Water Activities field
  - 9.1. Select the Data Type **Checkbox**
  - 9.2. Set the label to **Water Activities**
  - 9.3. Set the default value to **Unchecked**
  - 9.4. Set the name to **Water\_Activities**
  - 9.5. Click **Next**
  - 9.6. Review the profiles who will be able to see this field and click **Next**
  - 9.7. Confirm the field will be added to the **Registration Layout**, and click **Save and New**
10. Create an Arts Activities field
  - 10.1. Select the Data Type **Checkbox**
  - 10.2. Set the label to **Arts Activities**
  - 10.3. Set the default value to **Unchecked**
  - 10.4. Set the name to **Arts\_Activities**
  - 10.5. Click **Next**
  - 10.6. Review the profiles who will be able to see this field and click **Next**
  - 10.7. Confirm the field will be added to the **Registration Layout**, and click **Save**

## *Activity 4: Examine the Data Model in Schema Builder*

Now that you have completed adding your fields to your registration object, let's look at how your data model has turned out. The best view is to look at the data schema.

1. Click on the **Home** tab at the top of the screen
2. In the Quick Find search in the left navigation, start typing **Schema**, and click on the **Schema Builder** menu item
3. In the left navigation of Schema Builder, click on the **Clear All** link
4. Select the four objects that you are using in your app: **Account**, **Contact**, **Camp Program**, and **Registration**
5. Use the mini-map in the bottom right to navigate and organize your page to show all the objects and their relationships with each other



The screenshot shows the Salesforce Schema Builder interface. On the left, there's a sidebar with tabs for 'Elements' and 'Objects'. Under 'Objects', several items are listed, including 'Account', 'Contact', 'Camp Program', and 'Registration'. The main area displays four cards, one for each object, showing their respective fields. Red arrows point from the 'Created By' field in the 'Account' card to the 'Created By' fields in the 'Contact' and 'Camp Program' cards. A red box highlights the 'Created By' field in the 'Contact' card. A legend on the right side of the interface defines the colors used in the relationships: blue for Lookup Relationship, red for Master-Detail Relationship, and orange for Required Field.

Excellent! You have now completed building your data model for your application. With your data model, you will now be able to create logic, automation, reporting, and a user experience to complete your app.

## *Extra Credit Activity: Roll-up Summary Field and Formula Field*

One of the unique attributes of a master-detail relationship is the ability to roll-up summary information from a detail object to the master object. Wouldn't it be great if when you looked at a Camp Program, you could see a count of how many registrations there are against it? Well with a roll-up summary field, you can do just that.

1. In Schema Builder, click on the **Elements** tab of the left navigation
2. Drag and drop a Roll-up Summary field onto the **Camp Program** object
3. Set the label to Registered Campers
4. Set the name to Registered\_Campers
5. Choose the **Registrations** object as the summarized object
6. Choose **COUNT** as the summary type
7. Click **Save**

Now every time a new camper is registered to this camp program, the count will increase automatically. Let's take this one step further. What if you wanted a visual indicator of whether there are spots remaining in this camp program? Well you can use a formula field to be able to show this.

1. In Schema Builder, click on the **Elements** tab of the left navigation
2. Drag and drop a Formula field onto the **Camp Program** object
  - 2.1. Set the label to **Availability**
  - 2.2. Set the name to **Availability**
  - 2.3. Set the return type to **Text**
  - 2.4. In the formula box, paste the following formula:

```
IF ( Registered_Campers__c > 25, IMAGE ("/img/samples/light_red.gif", "Red"), IMAGE  
("/img/samples/light_green.gif", "Green") )
```

3. Select checkbox for Treat blank fields as zeroes
4. Click **Save**

You have now added a visual indicator for availability to the Camp Program object, that looks at your roll-up summary field to determine its value. Way to go!

## Module C: Designing the App Experience

Now that you have the data model in place, it is time to think about how users are going to interact with the data:

- Where are users accessing the data? Web browser? Mobile?
- Will users collaborate on records?
- What information is crucial for users to see first?

These questions are answered when you create a user experience dedicated to your camp management application. Let's start designing your app!

### *Activity 1: Load Sample Data for Camp Management Application*

Before you can start effectively shape the user experience, you need some data to work with. Luckily you don't have to manually create data, some is provided for you.

1. Open up the following link in your web browser: <https://github.com/SalesforceCA/HOAW>
2. Click **Clone or Download** and click **Download ZIP** (HOAW-Master.zip)

SalesforceCA / HOAW

This repository Search Sign in or Sign up

Code Issues Pull requests Projects Insights

Workshop repository for the Salesforce Hands-on Admin Workshop

3 commits 1 branch 0 releases 1 contributor

Branch: master New pull request

Clone with HTTPS Use Git or checkout with SVN using the web URL.  
<https://github.com/SalesforceCA/HOAW.git>

**Download ZIP**

File	Description	Last Commit
SalesforceCA committed on GitHub Add files via upload	Add files via upload	2 days ago
CampCabin.png	Add files via upload	2 days ago
CampPrograms_Sample.csv	Add files via upload	2 days ago
ChatterPost.txt	Add files via upload	2 days ago
Contacts_Sample.csv	Add files via upload	2 days ago
EmailTemplate.txt	Add files via upload	2 days ago
Families_Sample.csv	Add files via upload	2 days ago
README.md	Initial commit	2 days ago
Registrations_Sample.csv	Add files via upload	2 days ago
README.md		

<https://github.com/SalesforceCA/HOAW/archive/master.zip>

3. In the same browser as your Salesforce Developer Edition org, open a tab and navigate to <https://data.loader.io/>
4. Click **Login with Salesforce** at the top of the page
5. Click **Login**
6. Import Families into Salesforce
  - 6.1. Click **New Task and Import** from at the top of the page
  - 6.2. Choose the Operation **Insert**
  - 6.3. Search for and select the object **Family** and click **Next**

data.loader.io NEW TASK UPGRADE

Family Insert brichards@hoawredux.dev - Production

1. Connection & Object 2. File 3. Mapping 4. Run

Connection  
 brichards@hoawredux.dev - Production (default)

Operation  
 Insert Upsert Update

Object

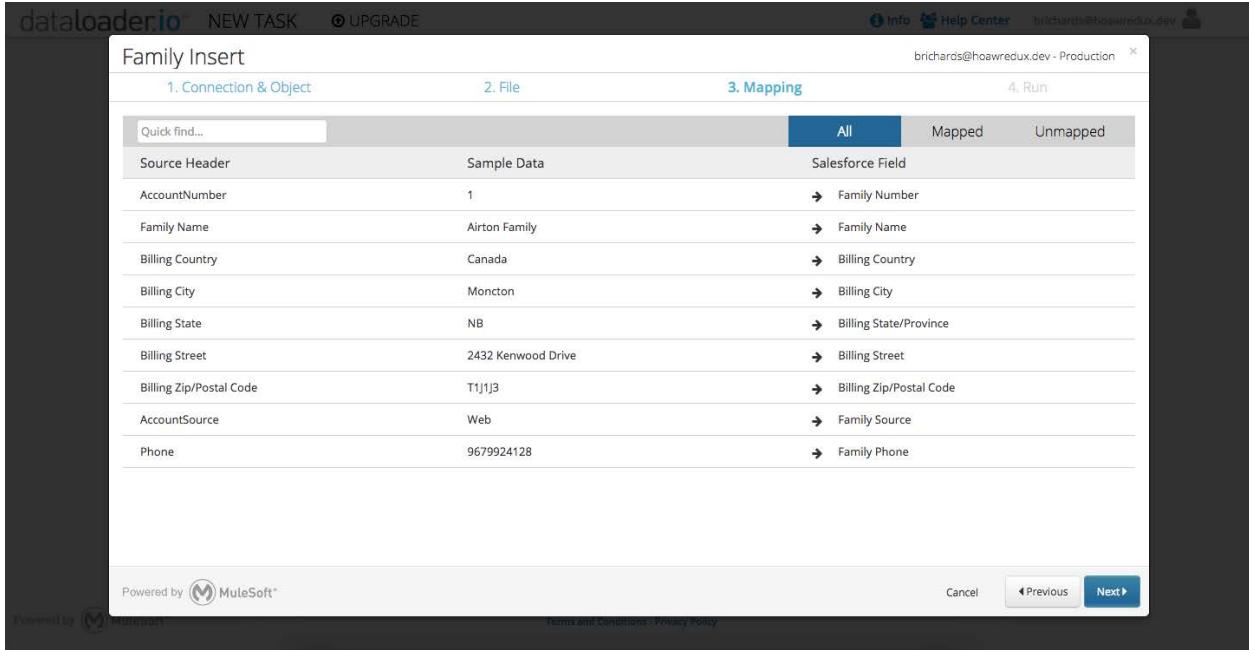
Family	Account
Family Contact Role	AccountContactRole
Feed Attachment	FeedAttachment
Feed Comment	FeedComment
Feed Item	FeedItem
Feed Like	FeedLike
Field Permissions	FieldPermissions
Flow Interview Share	FlowInterviewShare
Folder	Folder
Goal	TodayGoal

Powered by MuleSoft®

Cancel Next

7. From the **HOAW-Master.zip** file you downloaded locate **Families\_Sample.csv**

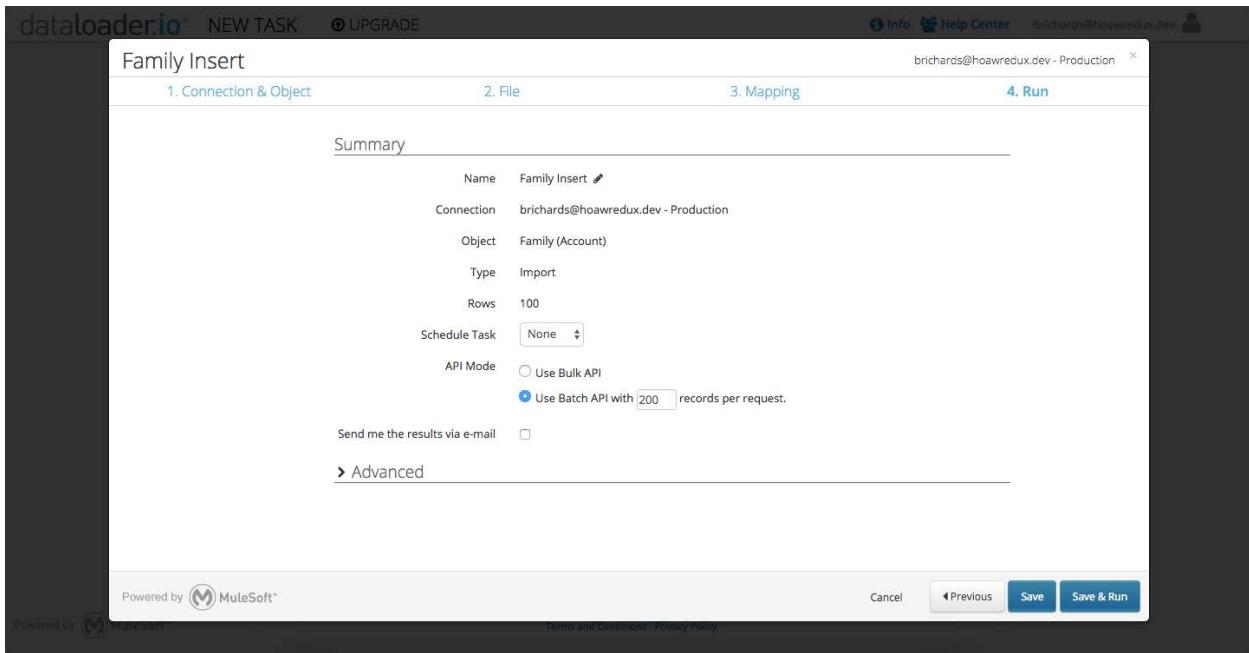
- 7.1. Upload the Families\_Sample.csv file
- 7.2. Confirm all fields are mapped.



The screenshot shows the dataloader.io interface for a 'Family Insert' task. It's on the '3. Mapping' step. The table maps fields from a sample CSV to Salesforce objects. The 'Source Header' column lists fields like AccountNumber, Family Name, Billing Country, etc. The 'Sample Data' column contains values for each. The 'Salesforce Field' column shows the corresponding object and field names, such as Family Number for AccountNumber. A 'Quick find...' search bar is at the top left. Navigation buttons 'All', 'Mapped', and 'Unmapped' are above the table. At the bottom right are 'Cancel', '< Previous', and 'Next >' buttons.

Source Header	Sample Data	Salesforce Field
AccountNumber	1	Family Number
Family Name	Airton Family	Family Name
Billing Country	Canada	Billing Country
Billing City	Moncton	Billing City
Billing State	NB	Billing State/Province
Billing Street	2432 Kenwood Drive	Billing Street
Billing Zip/Postal Code	T1J1J3	Billing Zip/Postal Code
AccountSource	Web	Family Source
Phone	9679924128	Family Phone

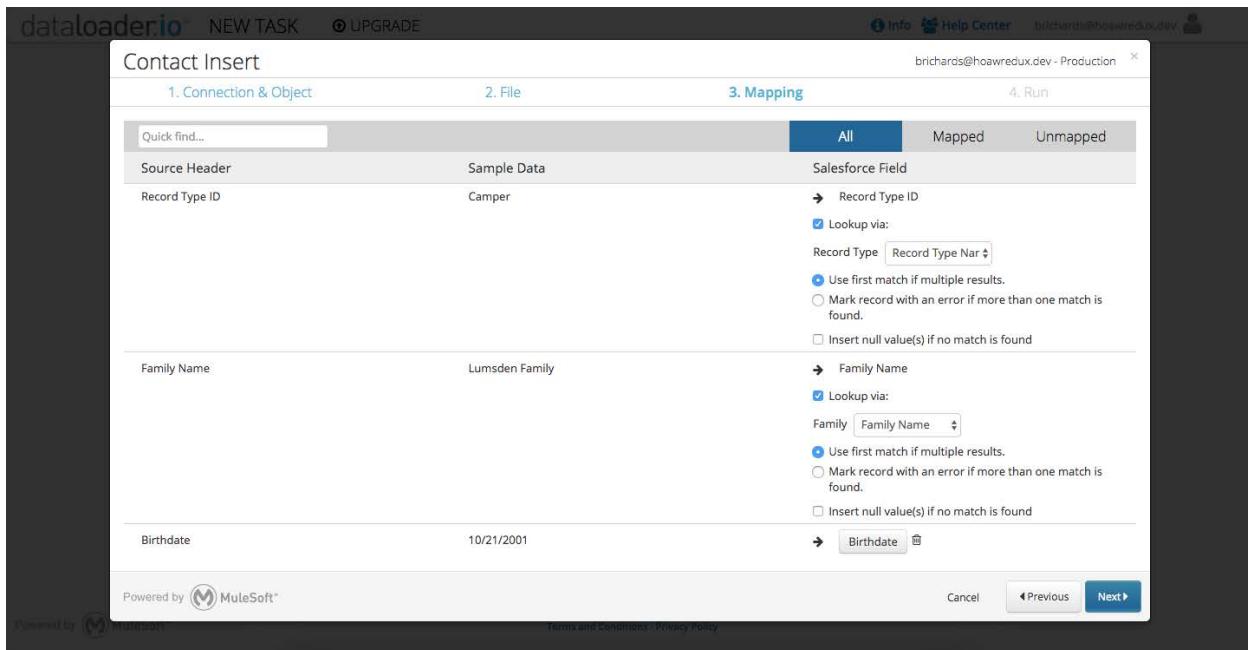
- 7.3. Select the API Mode **Batch API** with 200 records per request



The screenshot shows the '4. Run' step of the task configuration. It includes a 'Summary' section with task details: Name (Family Insert), Connection (brichards@hoawredux.dev - Production), Object (Family (Account)), Type (Import), Rows (100), Schedule Task (None), API Mode (selected 'Use Batch API with 200 records per request'), and an option to send results via e-mail (unchecked). Below is an 'Advanced' section with a link. At the bottom are 'Save' and 'Save & Run' buttons.

- 7.4. Click Save & Run
8. Import Contacts into Salesforce
  - 8.1. Click **New Task** and **Import** from at the top of the page
  - 8.2. Choose the Operation **Insert**
  - 8.3. Search for and select the object **Contact** and click **Next**

- 8.4. From the **HOAW-Master.zip** file you downloaded locate **Contacts\_Sample.csv**
- 8.5. Upload the **Contacts\_Sample.csv** file
- 8.6. Confirm all fields are mapped.
- 8.7. For the **Record Type ID** field, Select the checkbox for **Lookup Via** and choose **Record Type Name** from the dropdown
- 8.8. For the **Family Name** field, Select the checkbox for **Lookup Via** and choose **Family Name** from the dropdown



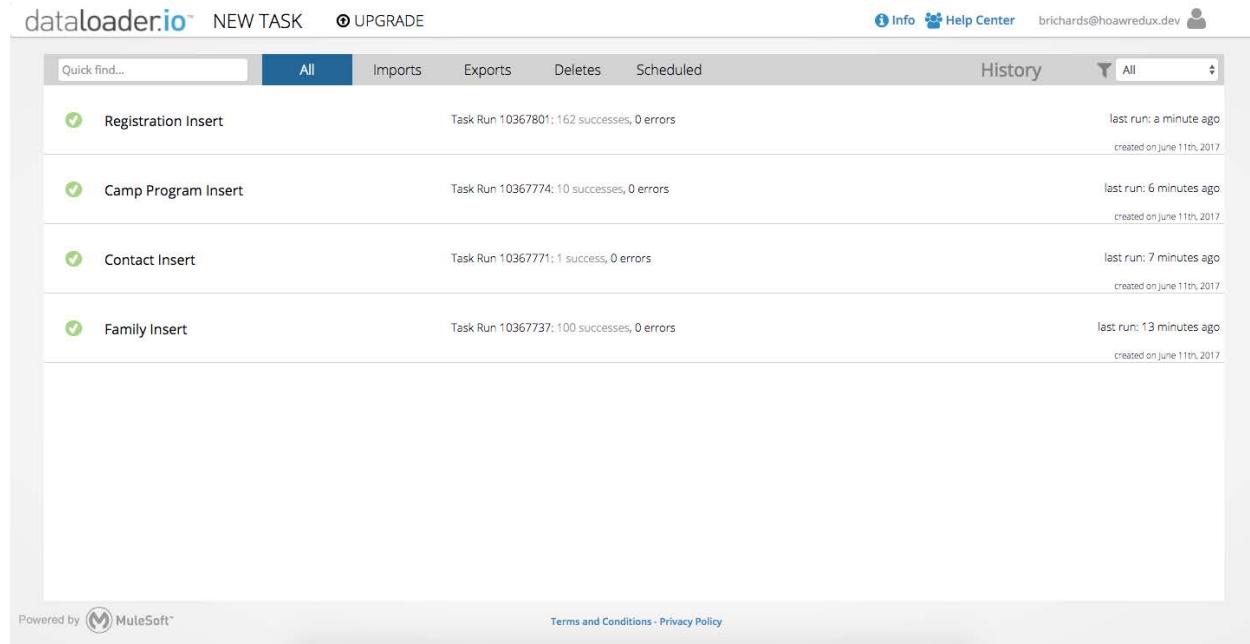
The screenshot shows the dataloader.io interface for a 'Contact Insert' task. The '3. Mapping' tab is active. The mapping details are as follows:

- Record Type ID:** Sample Data → Salesforce Field: Record Type ID.  Lookup via: Record Type Nar ↗. Options: Use first match if multiple results (selected), Mark record with an error if more than one match is found, Insert null value(s) if no match is found.
- Family Name:** Lumsden Family → Salesforce Field: Family Name.  Lookup via: Family ↗. Options: Use first match if multiple results (selected), Mark record with an error if more than one match is found, Insert null value(s) if no match is found.
- Birthdate:** 10/21/2001 → Salesforce Field: Birthdate ↗.

- 8.9. Select the API Mode **Batch API** with **200** records per request
  - 8.10. Click Save & Run
9. Import Camp Programs into Salesforce
    - 9.1. Click **New Task** and **Import** from at the top of the page
    - 9.2. Choose the Operation **Insert**
    - 9.3. Search for and select the object **Camp Program** and click **Next**
    - 9.4. From the HOAW-Master.zip file you downloaded locate **CampPrograms\_Sample.csv**
    - 9.5. Upload the **CampPrograms\_Sample.csv** file
    - 9.6. Confirm all fields are mapped.
    - 9.7. Select the API Mode **Batch API** with **200** records per request
    - 9.8. Click Save & Run
  10. Import Registrations into Salesforce
    - 10.1. Click **New Task** and **Import** from at the top of the page
    - 10.2. Choose the Operation **Insert**
    - 10.3. Search for and select the object **Registration** and click **Next**
    - 10.4. From the HOAW-Master.zip file you downloaded locate **Registrations\_Sample.csv**
    - 10.5. Upload the **Registrations\_Sample.csv** file
    - 10.6. Confirm all fields are mapped.
    - 10.7. For the **Camp Program** field, Select the checkbox for **Lookup Via** and choose **Camp Program Name** from the dropdown
    - 10.8. For the **Camper** field, Select the checkbox for **Lookup Via** and choose **Full Name** from the dropdown

- 10.9. For the **Guardian** field, Select the checkbox for **Lookup Via** and choose **Full Name** from the dropdown
- 10.10. Select the API Mode **Batch API** with **200** records per request
- 10.11. Click Save & Run

Congratulations, you have now uploaded in data that you can use when designing your app.

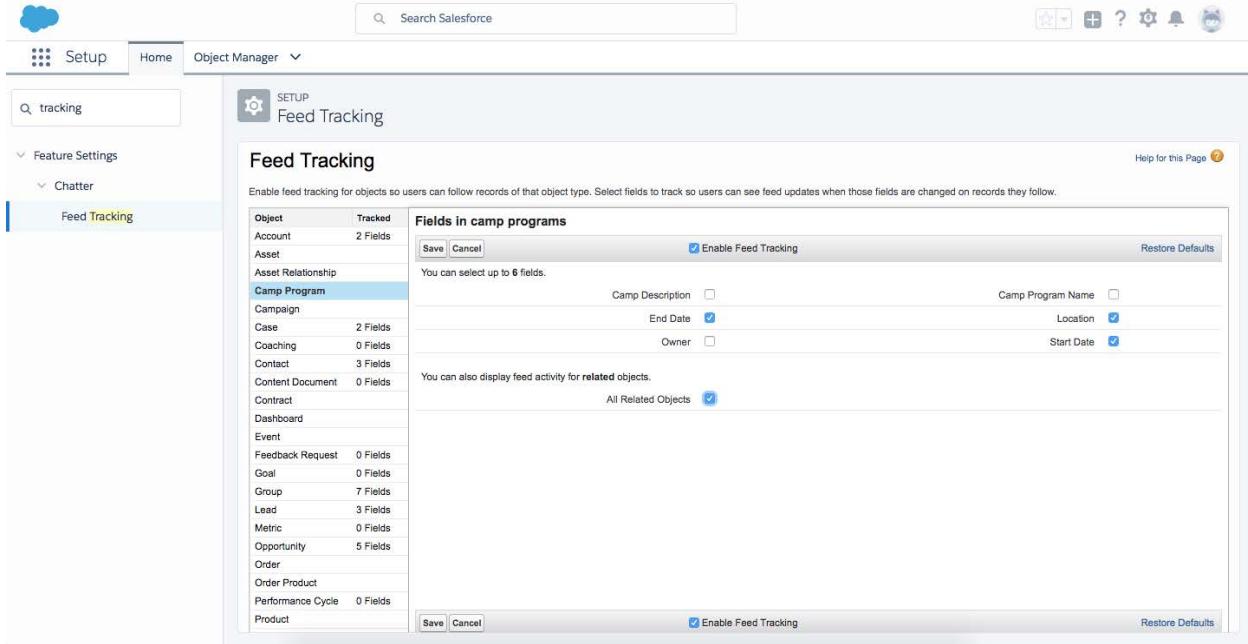


Task	Details	Last Run	Created On
Registration Insert	Task Run 10367801: 162 successes, 0 errors	a minute ago	created on June 11th, 2017
Camp Program Insert	Task Run 10367774: 10 successes, 0 errors	6 minutes ago	created on June 11th, 2017
Contact Insert	Task Run 10367771: 1 success, 0 errors	7 minutes ago	created on June 11th, 2017
Family Insert	Task Run 10367737: 100 successes, 0 errors	13 minutes ago	created on June 11th, 2017

## Activity 2: Enabling Feed Tracking

Salesforce feed tracking allows users to see when specific fields on a record have changed, as well as collaborate using Chatter.

1. Click on the **Home** tab at the top of the screen
2. In the Quick Find search in the left navigation, start typing **Tracking**, and click on the **Feed Tracking** menu item
3. Enable Feed Tracking for Camp Programs
  - 3.1. Select the **Camp Program** object from the left column
  - 3.2. Select the checkbox for **Enable Feed Tracking**
  - 3.3. Select the checkbox for the fields **Start Date**, **End Date**, **Location**, and **All Related Objects**
  - 3.4. Click **Save**



The screenshot shows the Salesforce Setup interface under the Object Manager section. On the left, there's a sidebar with 'Feature Settings' and 'Chatter' sections, with 'Feed Tracking' selected. The main area is titled 'Feed Tracking' and contains a sub-section for 'Camp Program'. It says 'Enable feed tracking for objects so users can follow records of that object type. Select fields to track so users can see feed updates when those fields are changed on records they follow.' A table lists various objects and their tracked fields. For 'Camp Program', it shows '2 Fields'. Below the table, there's a section for 'Fields in camp programs' with checkboxes for 'Camp Description', 'End Date', 'Owner', 'Camp Program Name', 'Location', and 'Start Date'. There's also a checkbox for 'All Related Objects'. At the bottom, there are 'Save' and 'Cancel' buttons, and a note about selecting up to 6 fields.

#### 4. Enable Feed Tracking for Camp Programs

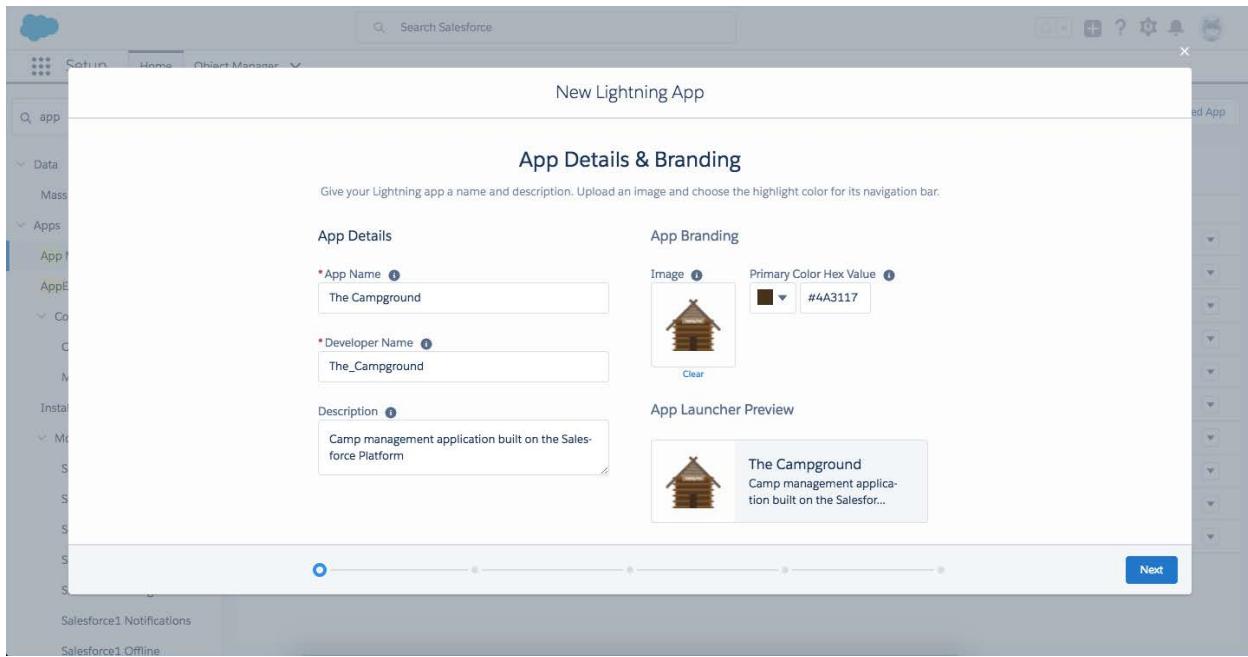
- 4.1. Select the **Registration** object from the left column
- 4.2. Select the checkbox for **Enable Feed Tracking**
- 4.3. Select the checkbox for the fields **Status** and **Nut Allergy**
- 4.4. Click **Save**

You have now enabled tracking on your custom objects!

### *Activity 3: Creating an App*

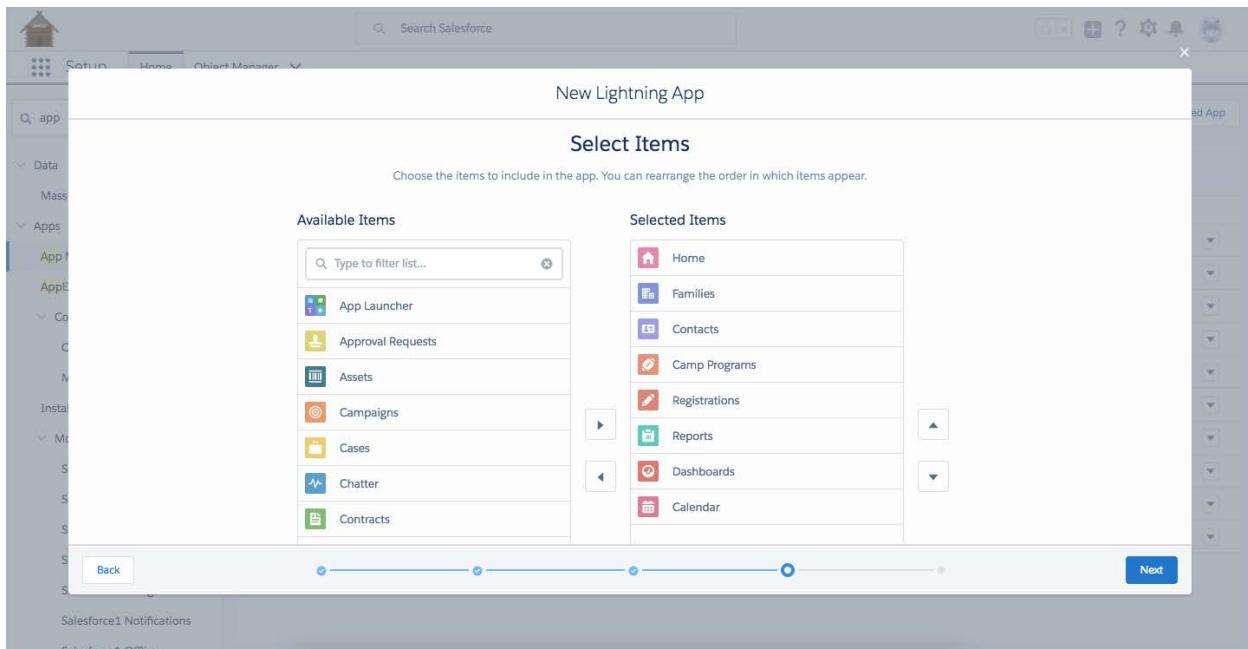
Salesforce allows users to create Apps that serve specific use cases. Some are provided by Salesforce when you start using the platform, such as Sales, Service, and Marketing. Today you are looking at the camp management use case, and you will need to create an app to access it through.

1. Click on the **Home** tab at the top of the screen
2. In the Quick Find search in the left navigation, start typing **App**, and click on the **App Manager** menu item
3. Click on the **New Lightning App** button
4. Set the app name as **The Campground**
5. Set the developer name as **The\_Campground**
6. From the **HOAW-Master.zip** file you downloaded locate **CampCabin.png**
7. Upload the **CampCabin.png** image as the App Image
8. Set the Primary Color Hex Value to **#4A3117**



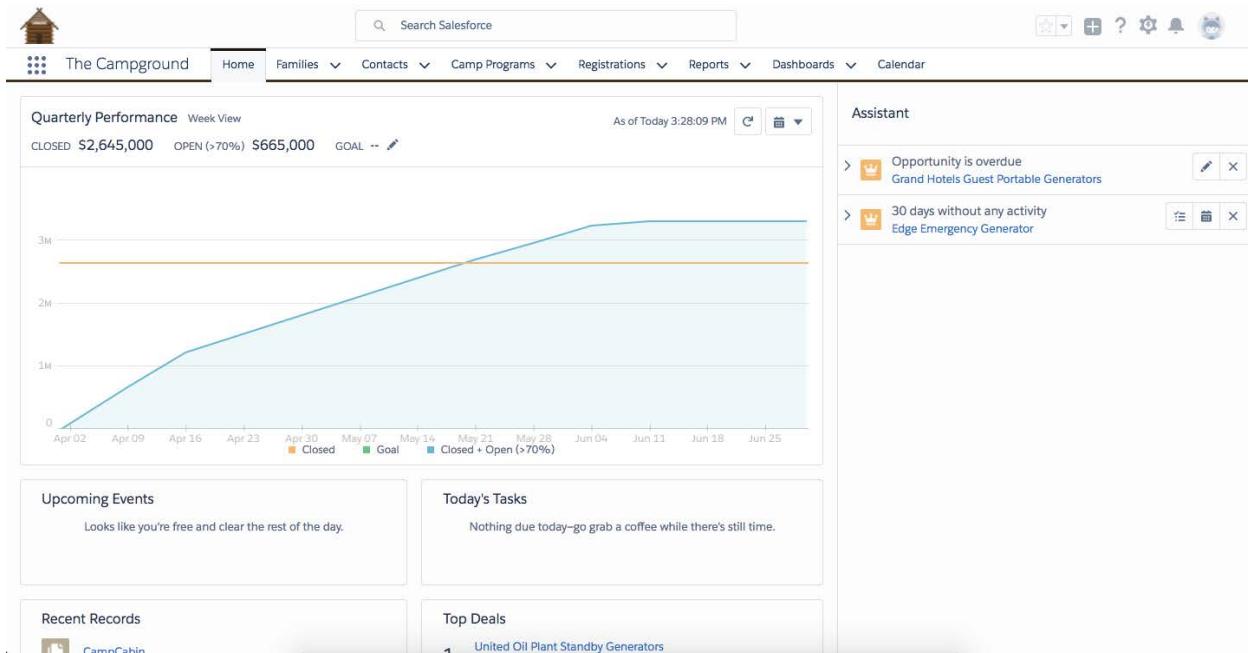
The screenshot shows the 'New Lightning App' setup page. In the 'App Details' section, the 'App Name' is set to 'The Campground' and the 'Developer Name' is set to 'The\_Campground'. In the 'App Branding' section, there is a placeholder image of a cabin and a color swatch set to '#4A3117'. Below these, the 'App Launcher Preview' shows a preview card for 'The Campground' with the cabin icon and the app details. A progress bar at the bottom indicates step 1 of 5, and a 'Next' button is visible.

9. Click **Next**
10. Select the radio button for **Standard Navigation** and click **Next**
11. Bypass the Utility Bar Setup by clicking **Next**
12. From the Available Items List, select Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar, and click **Next**



The screenshot shows the 'Select Items' setup page. On the left, under 'Available Items', there is a list of items including App Launcher, Approval Requests, Assets, Campaigns, Cases, Chatter, and Contracts. On the right, under 'Selected Items', there is a list of items including Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar. A double-headed arrow between the two lists indicates they can be moved. A progress bar at the bottom indicates step 2 of 5, and a 'Next' button is visible.

13. From the list of available profiles, select the **System Administrator** profile, and click **Save & Finish**
14. Click the App Launcher logo (⋮) in the top left of the page, and select **The Campground App**



Excellent, you have built a custom app for camp management. Next step is to review how a user would see each of your objects.

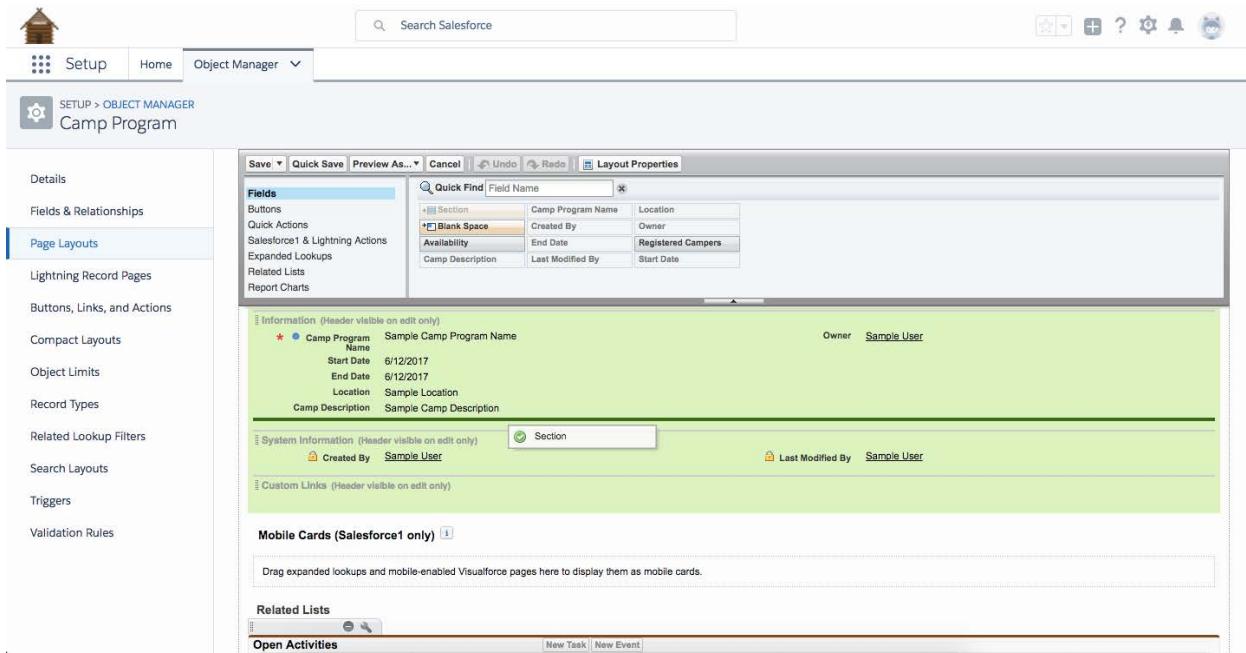
## Activity 4: Optimizing Object Layouts

Setting object layouts make all the difference for how users interact with data in Salesforce. There are a few layouts that need to be setup:

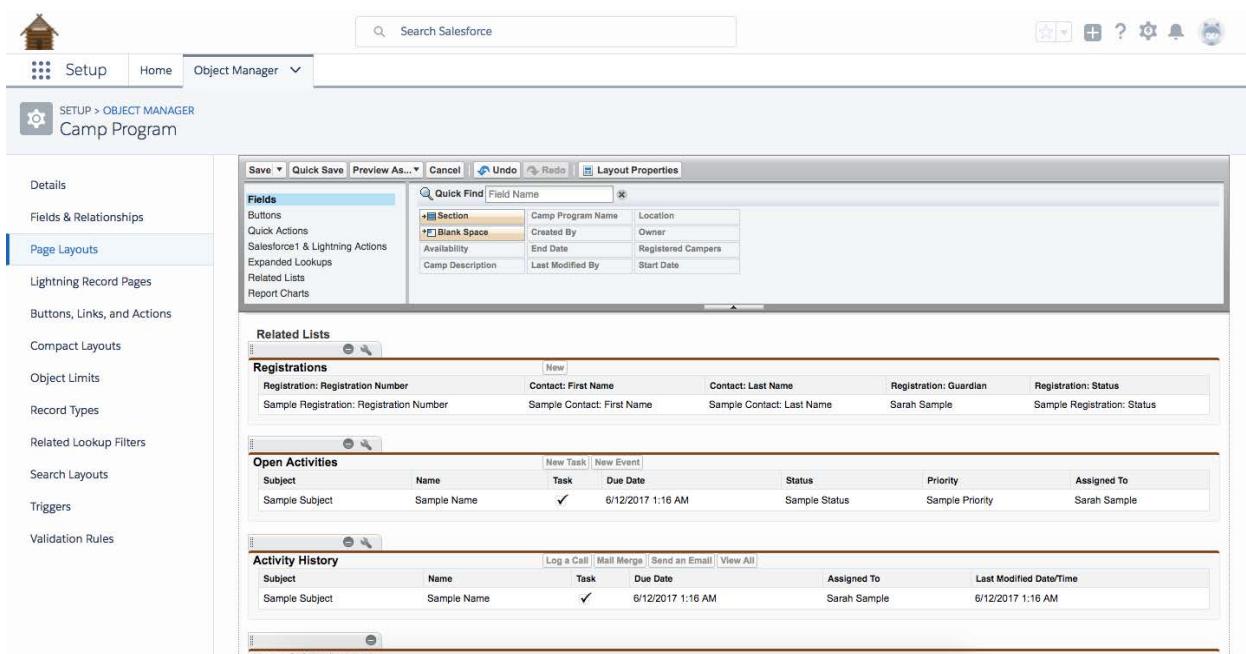
- **Page Layouts** – Salesforce uses page layouts to define how users see fields, related lists, and actions when looking at a record.
- **Compact Layouts** – A compact layout represents the highlight reel for a record – the few key fields that tell a user all they need to know without having to scroll through the entire details section.
- **Search Layouts** – These layouts define the way records show up in search results, lookups, and list views.

When you create a custom object, Salesforce creates the layouts for you, but you will want to review and edit them to make sure they meet the requirements of your app.

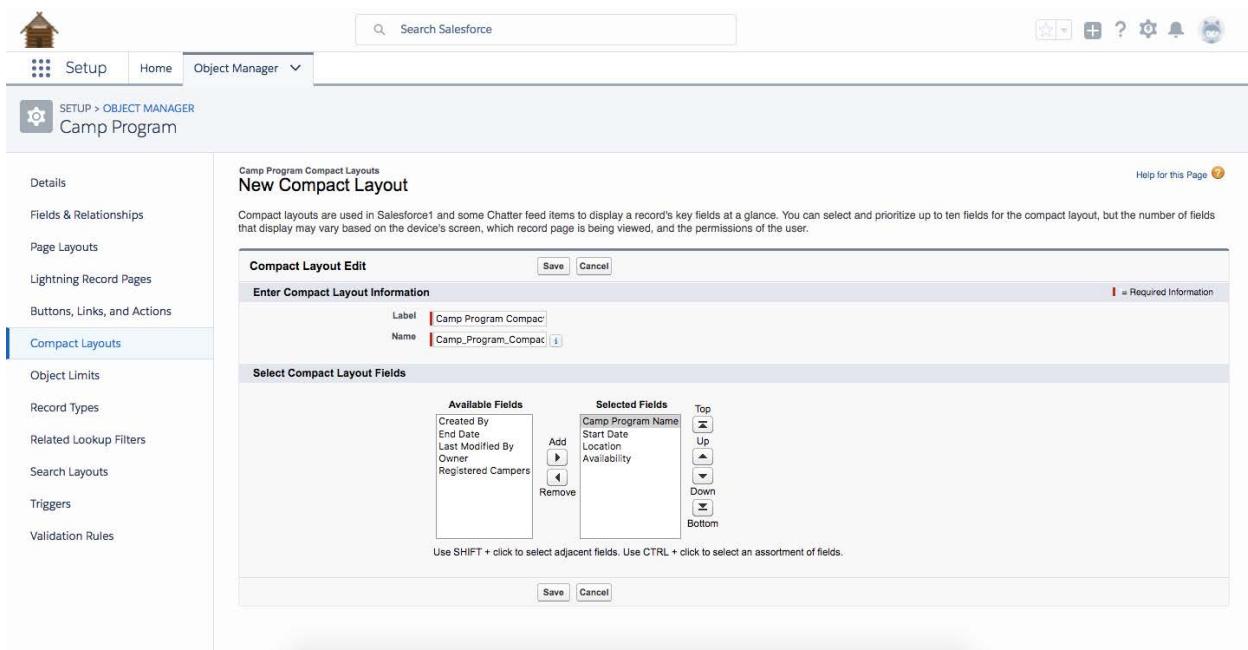
1. Click on the Cog icon () in the top right of the page, and click **Setup**
2. Click on the **Object Manager** tab at the top of the screen
3. Within Object Manager, find the **Camp Program** object, and click on the label link
4. In the left navigation, select **Page Layouts**, and select the **Camp Program Layout**
5. Enable Salesforce1 and Lightning Experience Actions by clicking on the **Override the predefined actions** link
6. *Optional:* Add section for Availability (requires Extra Credit activity completion)
  - 6.1. From the toolbox grab a **Section** and drag it onto the layout above System Information



- 6.1.1. Set the section name as **Availability**
- 6.1.2. Set the layout as **2-Column**
- 6.1.3. Set the tab-key order as **Left-Right**
- 6.2. From the toolbox, drag the **Registered Campers** field into the Availability section
- 6.3. From the toolbox, drag the **Availability** field into the Availability section
7. Under related list, grab the **Registrations** related list, and drag to the top of the related lists
8. Click on the wrench icon (🔧) on the Registrations related list
  - 8.1. From the available field list, select Contact: First Name, Contact: Last Name, Registration: Guardian, and Registration: Status
  - 8.2. Click **Ok**

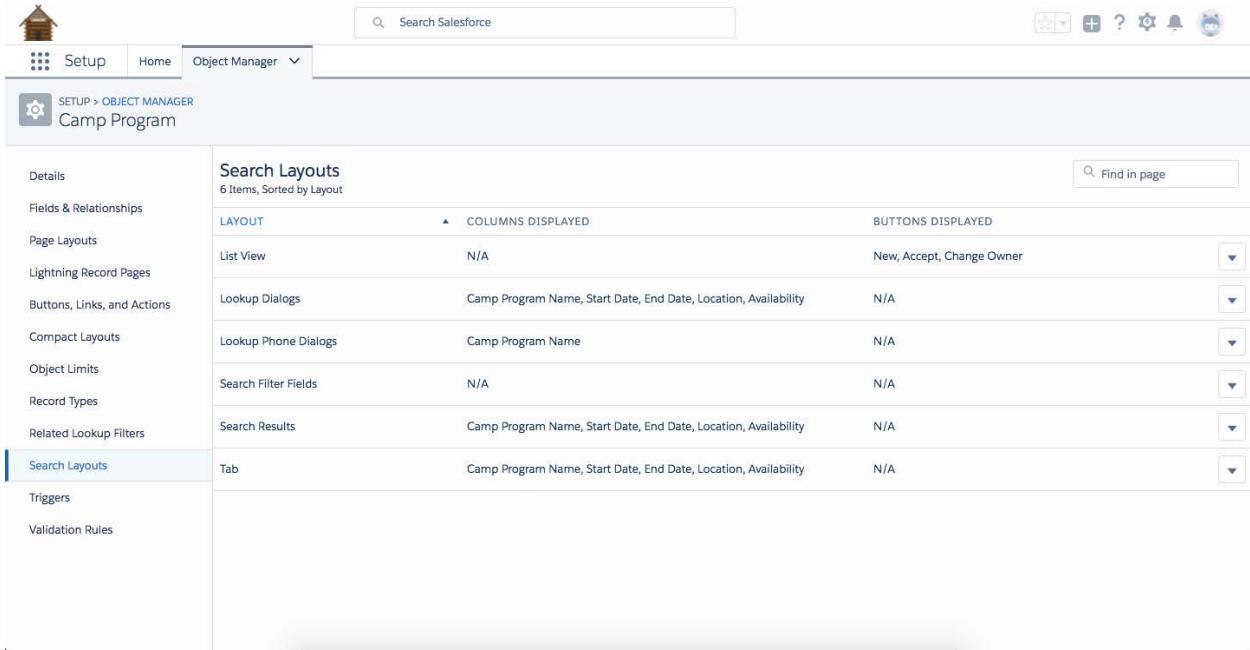


9. In the toolbox, click **Save**
10. From the left navigation, select **Compact Layouts** and click **New**
  - 10.1. Set label to Camp Program Compact
  - 10.2. Set name to Camp\_Program\_Compact
  - 10.3. From the list of available fields, select **Camp Program Name, Start Date, Location, and Availability (optional)**



The screenshot shows the Salesforce Setup interface for creating a new compact layout. The left sidebar is titled 'Object Manager' and lists various setup categories. The 'Compact Layouts' category is currently selected. The main content area is titled 'Camp Program Compact Layouts' and 'New Compact Layout'. It contains a form with fields for 'Label' (set to 'Camp Program Compact') and 'Name' (set to 'Camp\_Program\_Compact'). Below this is a section titled 'Select Compact Layout Fields' which lists available fields like 'Created By', 'End Date', etc., and selected fields like 'Camp Program Name', 'Start Date', 'Location', and 'Availability'. A 'Top' button is highlighted above the selected fields. At the bottom of the page are 'Save' and 'Cancel' buttons.

- 10.4. Click **Save**
- 10.5. Click Compact Layout Assignment
- 10.6. Click Edit Assignment
- 10.7. Select **Camp Program Compact** from dropdown as the primary compact layout
- 10.8. Click **Save**
11. From the left navigation select **Search Layouts**
12. On the **Lookup Dialogs** row, click the carrot button (▼) and click **Edit**
  - 12.1. From the list of available fields, select **Camp Program Name, Start Date, End Date, Location, and Availability (optional)**
  - 12.2. Click **Save**
13. Repeat for **Search Results** layout and **Tab** layout



The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Search Layouts' section selected under 'Object Manager'. The main area displays a table titled 'Search Layouts' with 6 items, sorted by layout. The columns are 'LAYOUT', 'COLUMNS DISPLAYED', and 'BUTTONS DISPLAYED'. The rows show the following details:

LAYOUT	COLUMNS DISPLAYED	BUTTONS DISPLAYED
List View	N/A	New, Accept, Change Owner
Lookup Dialogs	Camp Program Name, Start Date, End Date, Location, Availability	N/A
Lookup Phone Dialogs	Camp Program Name	N/A
Search Filter Fields	N/A	N/A
Search Results	Camp Program Name, Start Date, End Date, Location, Availability	N/A
Tab	Camp Program Name, Start Date, End Date, Location, Availability	N/A

14. Click on the **Object Manager** tab at the top of the screen
15. Within Object Manager, find the **Registration** object, and click on the label link
16. In the left navigation, select **Page Layouts**, and select the **Registration Layout**
17. Enable Salesforce1 and Lightning Experience Actions by clicking on the **Override the predefined actions** link
18. Add section for Camper Preferences
  - 18.1. From the toolbox grab a **Section** and drag it onto the layout above System Information
  - 18.1.1. Set the section name as **Camper Preferences**
  - 18.1.2. Set the layout as **2-Column**
  - 18.1.3. Set the tab-key order as **Left-Right**
  - 18.2. From the page layout, rearrange **Nut Allergy**, **Diabetic**, **Arts Activities**, and **Water Activities** under the Camper Preferences section
19. In the toolbox, click **Save**
20. From the left navigation, select **Compact Layouts** and click **New**
  - 20.1. Set label to **Registration Compact**
  - 20.2. Set name to **Registration Compact**
  - 20.3. From the list of available fields, select **Registration Number**, **Camp Program**, **Camper**, **Guardian**, and **Status**
  - 20.4. Click **Save**
  - 20.5. Click Compact Layout Assignment
  - 20.6. Click Edit Assignment
  - 20.7. Select **Registration Compact** from dropdown as the primary compact layout
  - 20.8. Click **Save**
21. From the left navigation select **Search Layouts**
22. On the **Lookup Dialogs** row, click the carrot button (▼) and click **Edit**
  - 22.1. From the list of available fields, select **Registration Number**, **Camp Program**, **Camper**, **Guardian**, and **Status**
  - 22.2. Click **Save**
23. Repeat for **Search Results** layout and **Tab** layout

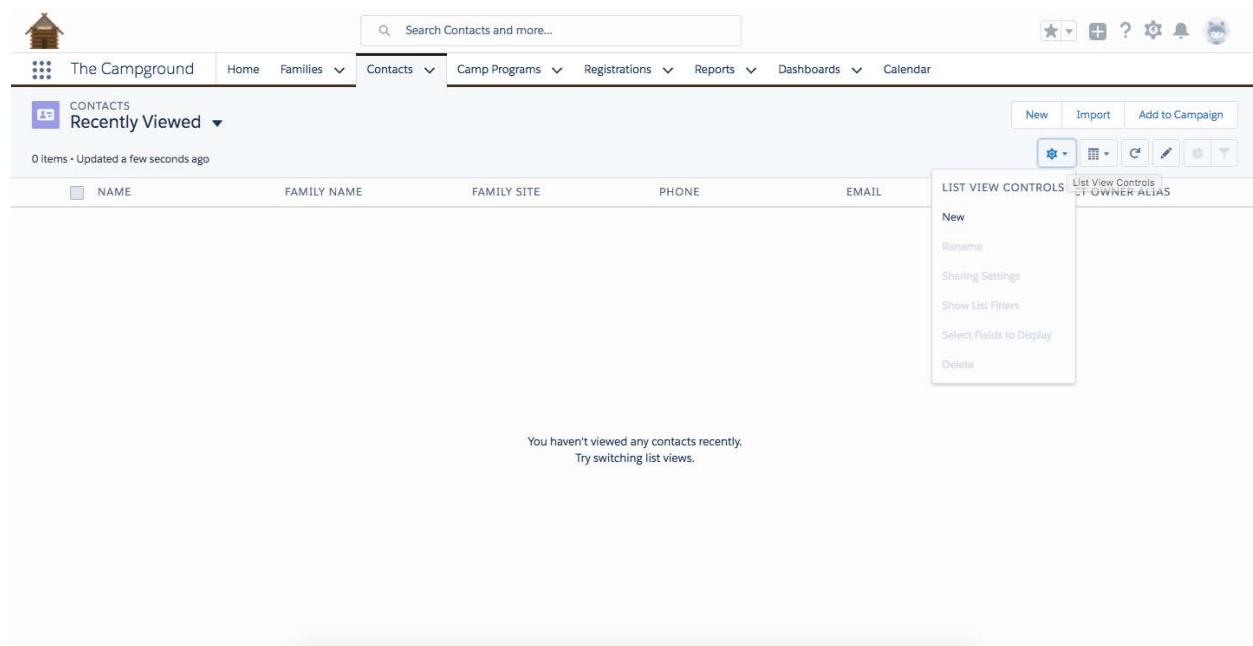
Whew! That was a lot of work – but now all of your users will be able to see the right information about the camp programs and registrations wherever they are in Salesforce.

There are few other things you can do to create tailor your app: Create list views, setup a Kanban, add a path, and create a custom Calendar.

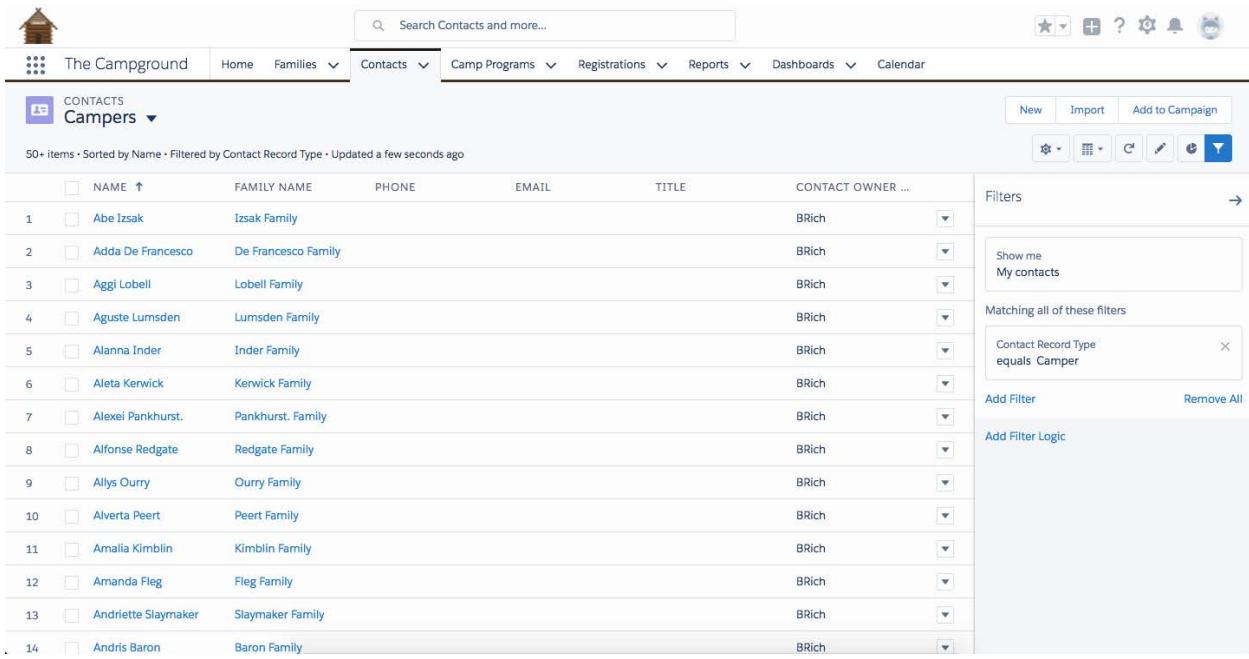
## Activity 5: Create List Views and Kanban

Let's start by creating a List View for campers in your Contacts tab.

1. Click the App Launcher logo (⋮) in the top left of the page, and select **The Campground App**
2. Click on the **Contacts** tab at the top of the page
3. Click the cog button (⚙️) in the list view and Click **New**



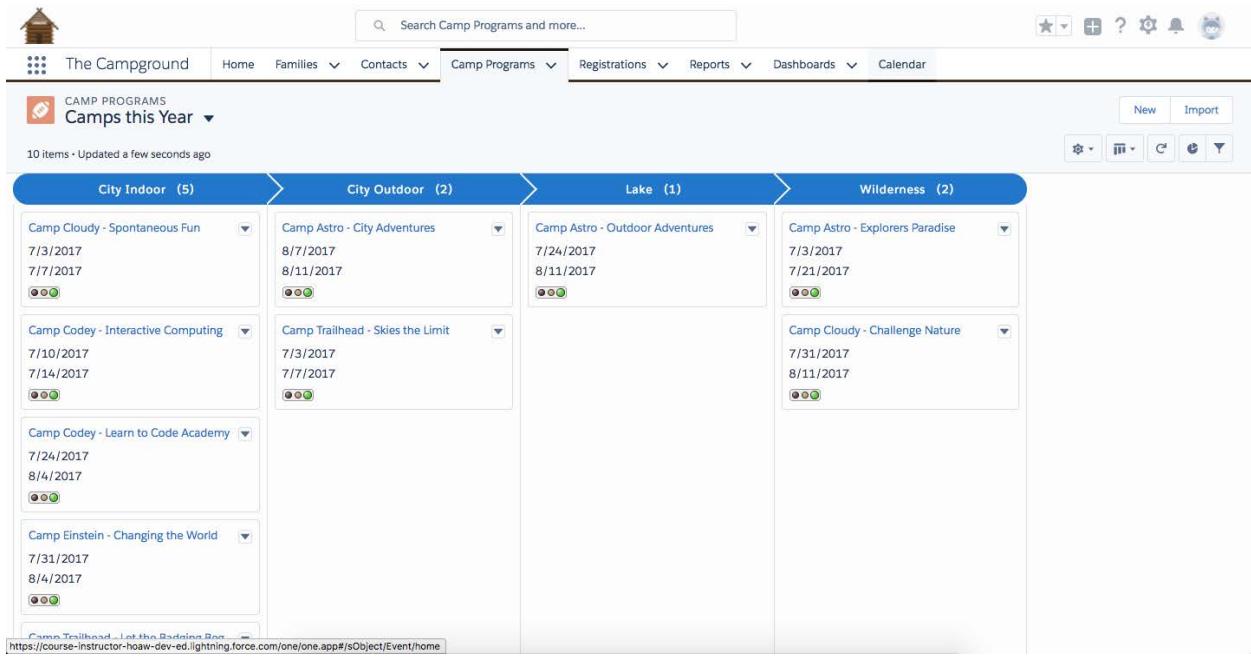
- 3.1. Set the list name to **Campers**
- 3.2. Click the radio button for **All users can see this view**
- 3.3. On the right-side panel, click **Add Filter**
- 3.4. Set Field to Contact Record Type
- 3.5. Set Operator to **Equals**
- 3.6. Set Value to **Camper**
- 3.7. Click **Save**



The screenshot shows the Salesforce Contacts page for the 'Camps This Year' dataset. The page header includes the 'The Campground' logo, navigation tabs like Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar, and a search bar. On the right, there are buttons for New, Import, Add to Campaign, and various list view options. A sidebar on the right contains filters for 'Contact Record Type equals Camper', with options to Show me My contacts, Add Filter, Remove All, and Add Filter Logic.

	NAME ↑	FAMILY NAME	PHONE	EMAIL	TITLE	CONTACT OWNER ...
1	Abe Izsak	Izsak Family			BRich	▼
2	Adda De Francesco	De Francesco Family			BRich	▼
3	Aggi Lobell	Lobell Family			BRich	▼
4	Aguste Lumsden	Lumsden Family			BRich	▼
5	Alanna Inder	Inder Family			BRich	▼
6	Aleta Kerwick	Kerwick Family			BRich	▼
7	Alexei Pankhurst.	Pankhurst. Family			BRich	▼
8	Alfonse Redgate	Redgate Family			BRich	▼
9	Allys Ourry	Ourry Family			BRich	▼
10	Alverta Peert	Peert Family			BRich	▼
11	Amaila Kimblin	Kimblin Family			BRich	▼
12	Amanda Fleg	Fleg Family			BRich	▼
13	Andriette Slaymaker	Slaymaker Family			BRich	▼
14	Andris Baron	Baron Family			BRich	▼

4. Click on the **Camp Programs** tab at the top of the page
5. Click the cog button () in the list view and Click **New**
  - 5.1. Set the list name to **Camps This Year**
  - 5.2. Click the radio button for **All users can see this view**
  - 5.3. On the right-side panel, click **Add Filter**
  - 5.4. Set Field to **Start Date**
  - 5.5. Set Operator to **Equals**
  - 5.6. Set Value to **THIS YEAR**
  - 5.7. Click **Save**
6. Click the cog button () in the list view and click **Select Fields to Display**
7. From the list of available fields, select **Camp Program Name, Start Date, End Date, Availability (optional), and Location**
8. Click the list button () in the list view and click **Kanban**
9. Set group by to **Location**



The screenshot shows a Salesforce app cloud interface for 'The Campground' application. The top navigation bar includes links for Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar. A search bar at the top right says 'Search Camp Programs and more...'. Below the navigation is a section titled 'CAMP PROGRAMS' with a sub-section 'Camps this Year'. It displays 10 items updated a few seconds ago. The items are categorized into four groups: 'City Indoor (5)', 'City Outdoor (2)', 'Lake (1)', and 'Wilderness (2)'. Each group contains a list of camp programs with their names, dates, and small icons.

Category	Program Name	Date
City Indoor (5)	Camp Cloudy - Spontaneous Fun	7/13/2017
		7/17/2017
	Camp Codey - Interactive Computing	7/10/2017
		7/14/2017
City Outdoor (2)	Camp Astro - City Adventures	8/7/2017
		8/11/2017
	Camp Trailhead - Skies the Limit	7/3/2017
		7/7/2017
Lake (1)	Camp Astro - Outdoor Adventures	7/24/2017
		8/11/2017
Wilderness (2)	Camp Astro - Explorers Paradise	7/3/2017
		7/21/2017
Camp Cloudy - Challenge Nature	7/31/2017	
		8/11/2017

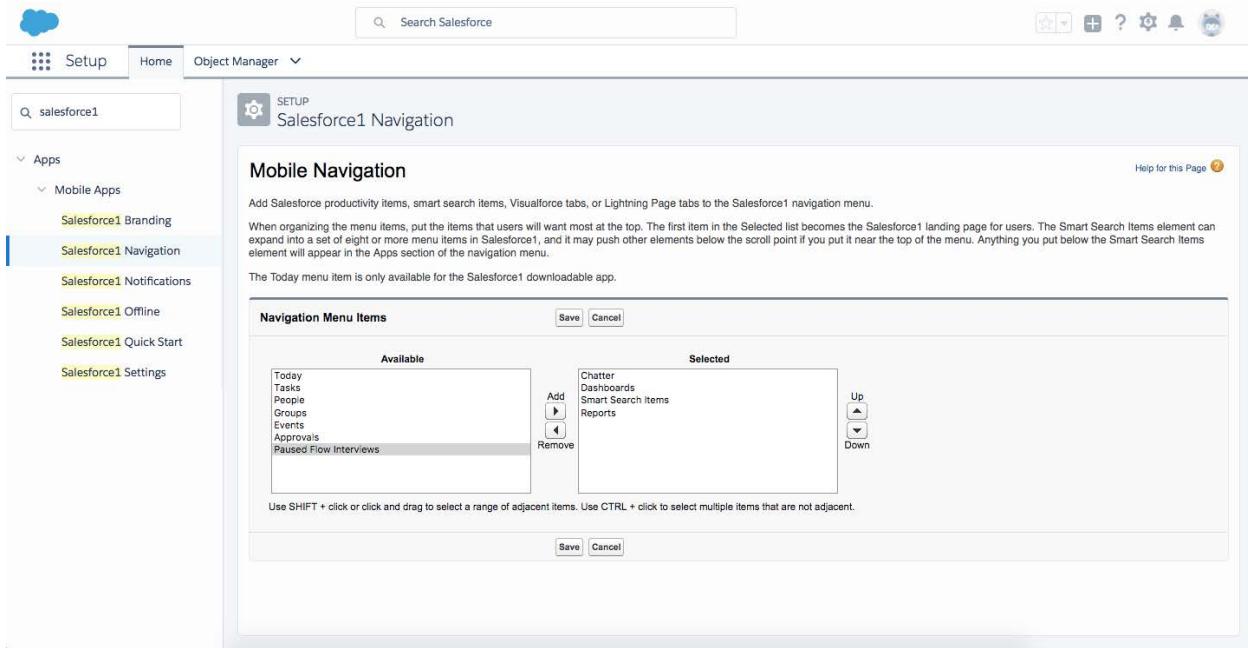
You now have list views ready to explore your campers and your camps.

## Activity 6: Customizing Salesforce1

Wouldn't it be great if you could take your camp management app on the road with you? When building your app on Salesforce, it is mobile-ready immediately. By setting up page layouts, compact layouts and search layouts, users will be able to have the see the same information on their mobile device as they do in a web browser.

There are few unique things you can do to tailor the mobile app, including customizing branding, and the navigation. Let's take a look how.

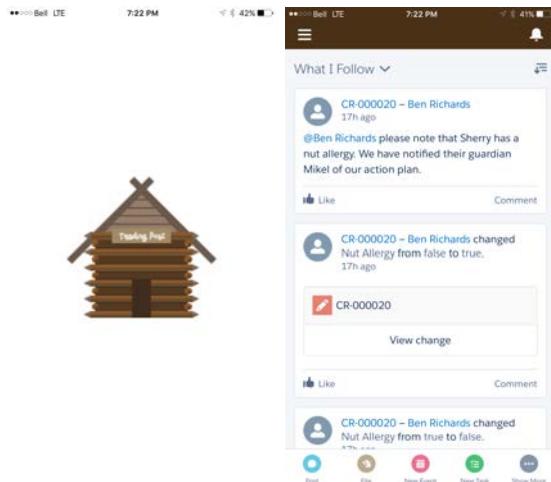
1. Click on the Cog icon () in the top right of the page, and click **Setup**
2. In the Quick Find search, start typing **Salesforce1**, and click **Salesforce1 Branding**
3. Click **Edit**
4. Set the brand color to **#4A3117**
5. For loading page logo, upload the **CampCabin.png** file
6. Click **Save**
7. In the Quick Find search, start typing **Salesforce1**, and click **Salesforce1 Navigation**
8. From the selected list, remove **Today, Tasks, People, Groups, Events, Approvals, and Paused Flow Interviews**



The screenshot shows the Salesforce Setup interface. On the left, the App Launcher sidebar is open, showing the 'Salesforce1' app selected under 'Mobile Apps'. The main content area is titled 'Salesforce1 Navigation' and displays the 'Mobile Navigation' configuration. It includes a description of how to organize menu items, a note about the Today menu item being available only for the Salesforce1 downloadable app, and a 'Navigation Menu Items' configuration pane. This pane has two sections: 'Available' (containing Today, Tasks, People, Groups, Events, Approvals, and Paused Flow Interviews) and 'Selected' (containing Chatter, Dashboards, Smart Search Items, and Reports). Buttons for 'Add' (with arrows), 'Remove', and 'Up/Down' sorting are present between the sections. A note at the bottom says 'Use SHIFT + click or click and drag to select a range of adjacent items. Use CTRL + click to select multiple items that are not adjacent.' Save and Cancel buttons are at the bottom of the configuration pane.

## 9. Click **Save**

10. On your phone, login to **Salesforce1** with your Developer Edition credentials.
11. Review the mobile app



Your mobile app is ready to use when you leave your computer. As you add to it, all the changes will be there without any extra work.

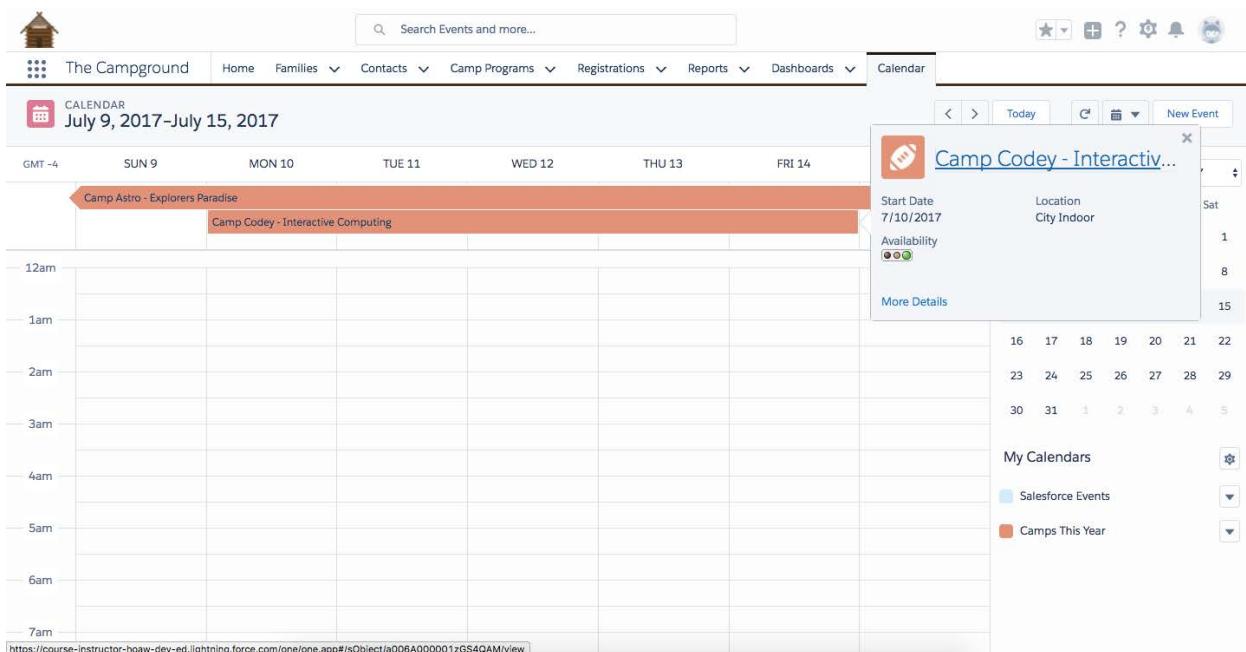
With your data model in place, and now a compelling user experience for users, you are almost finished building your app! The next step is adding in some logic and automation, and preparing reporting.

## *Extra Credit Activity: Create a Custom Calendar*

List views are one way to look at your data, but Salesforce also lets you set up calendars to explore.

1. Click the App Launcher logo (⋮) in the top left of the page, and select **The Campground App**

2. Click on the **Calendar** tab at the top of the page
3. Click on the cog button () on the right side of the page, and click **New Calendar**
4. Set the object to **Camp Program**, and click **Next**
5. Set the name to **Camps This Year**
6. Select field for start as **Start Date**
7. Select field for end as **End Date**
8. Apply filter Camps This Year
9. Set the field name to display as **Camp Program Name**
10. Click **Save**



The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a navigation bar with links for Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and a Calendar tab. Below the navigation is a search bar labeled "Search Events and more...". The main area is a calendar view for the week of July 9-15, 2017. Two events are listed: "Camp Astro - Explorers Paradise" and "Camp Codey - Interactive Computing". A tooltip for "Camp Codey - Interactive Computing" provides event details: Start Date (7/10/2017), Location (City Indoor), and Availability (80%). To the right of the calendar is a sidebar titled "My Calendars" which lists "Salesforce Events" and "Camps This Year". The URL at the bottom of the page is <https://course-instructor-hoaw-dev-ed.lightning.force.com/one/one.app#/sObject/a006A000001zGS4QAM/view>.

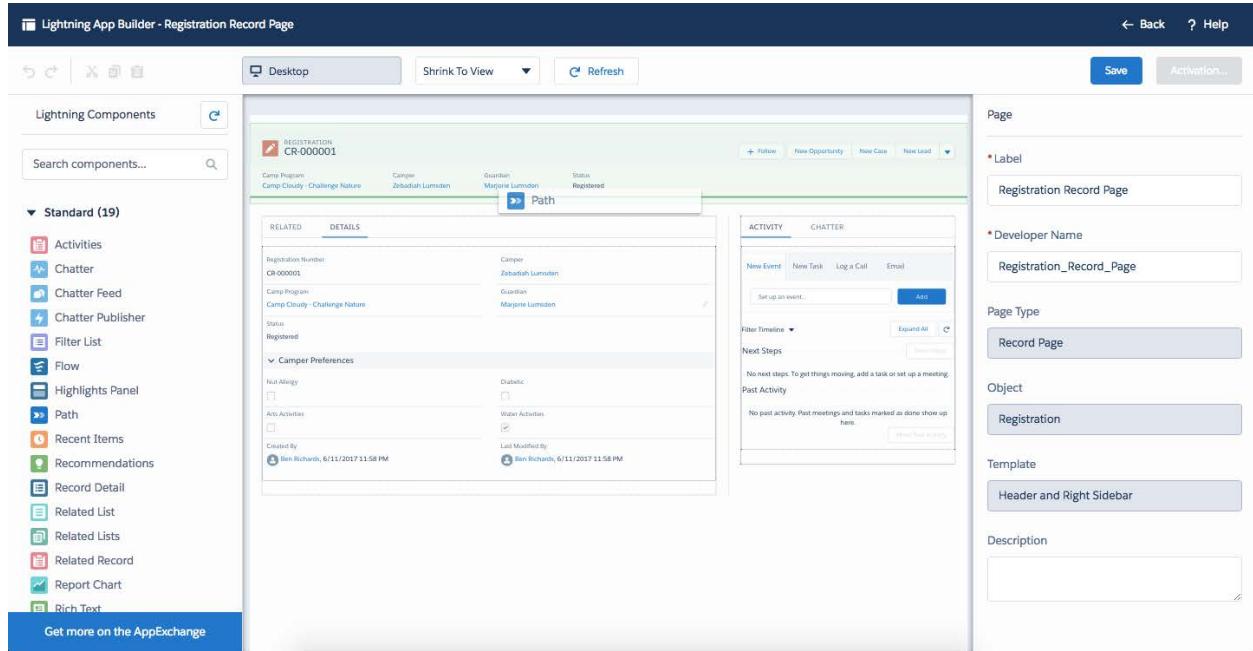
You now have a custom calendar that will show what camps are running by week or month!

## *Extra Credit Activity: Creating a Path*

Salesforce introduced Paths with the Lightning Experience, allowing administrators to add visual paths to lightning app pages to indicate status, stages, and other progression attributes. Let's add one to your Registration object

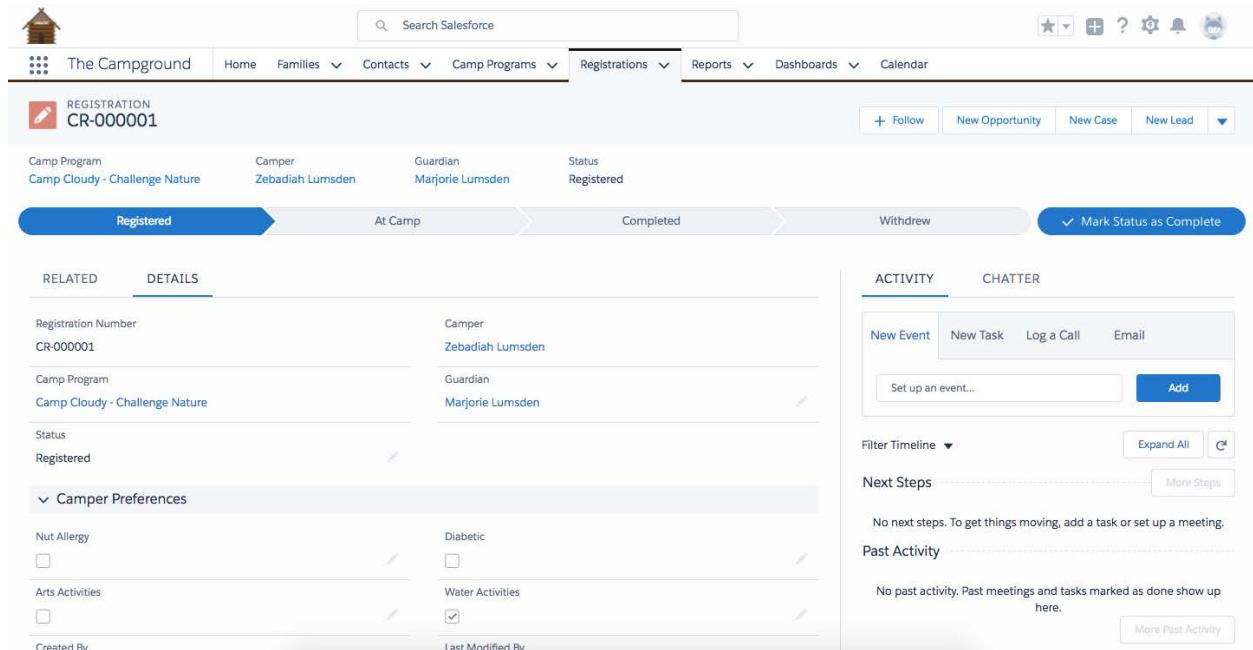
1. Click on the Cog icon () in the top right of the page, and click **Setup**
2. In the Quick Find search, start typing **Path**, and click **Path Settings**
3. Click on **Enable**
4. Click on **New Path**
  - 4.1. Set the path name as **Registration Status**
  - 4.2. Set the API reference name as **Registration\_Status**
  - 4.3. Select the object **Registration**
  - 4.4. Select the picklist **Status**
  - 4.5. Click **Next**
  - 4.6. Bypass adding field and guidance, and click **Next**
  - 4.7. Set path to **Active**
5. In the Global Search, search for **CR-000001** and click on the record

6. Click on the Cog icon (⚙) in the top right of the page, and click **Edit Page**
7. From the toolbox on the left of the page, drag **Path** under the Highlights Panel



The screenshot shows the Lightning App Builder interface for a 'Registration Record Page'. The main area displays a registration record for CR-000001, showing details like Camp Program (Camp Cloudy - Challenge Nature), Camper (Zebadiah Lumsden), Guardian (Marjorie Lumsden), and Status (Registered). A 'Path' component is visible on the right side of the page. The configuration sidebar on the right contains fields for Label ('Registration Record Page'), Developer Name ('Registration\_Record\_Page'), Page Type ('Record Page'), Object ('Registration'), Template ('Header and Right Sidebar'), and Description.

8. Click **Save**
9. Click **Activate**
10. Click **Assign as Org Default**
11. Click **Save**
12. Click **Back** at the top of the page



The screenshot shows the Salesforce homepage with the navigation bar: Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar. Below the navigation is a registration record for CR-000001. The registration details are identical to the previous screenshot. The status is now 'Registered'. A blue button at the bottom right says 'Mark Status as Complete'.

Awesome, you have now added a path to the registration object, allowing users to visual identify the status of the registration at a glance.

## Module D: Adding Logic and Automation

The Salesforce platform allows administrators to create both simple and complex logic and automation, all with clicks not code. This declarative approach to building ensure that you as an administrator can be agile, flexible, but also powerful!

There are a few types of declarative logic and automation at your disposal:

- **Validation Rules** – Create criteria based checks within salesforce that show users a warning message when criteria have not been met.
- **Process Builder** – Process-driven workflow in the format of if-this-than-that questions, enabling automated actions to happen with criteria are met.
- **Workflow Rules** – Action-driven workflow that can be initiated immediately, or scheduled into the future.
- **Visual Workflow** – Complex automation where administrators can create wizards to walk users through a process.
- **Approval Processes** – Formal approval chains that look at criteria to determine who should approve a record before it proceeds to its next step.

Today, you are going to use validation rules and process builder to add some complexity to your camp management application.

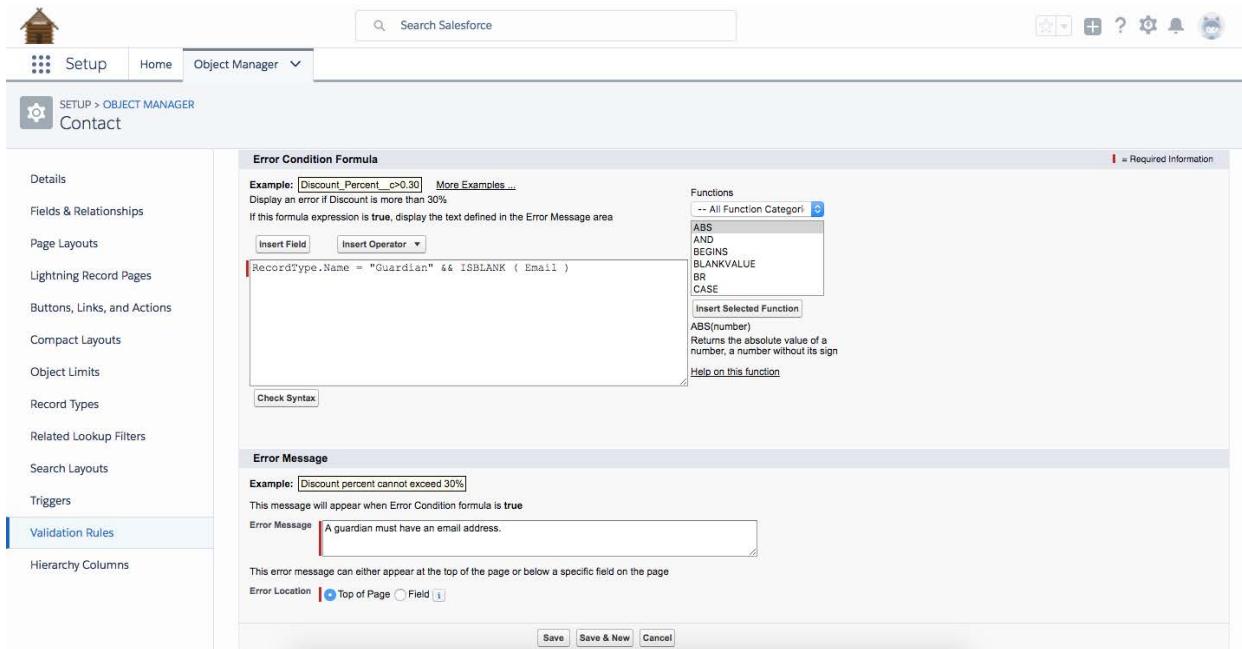
### Activity 1: Creating Validation Rules

Validation rules are helpful for a few key use cases that you will explore now. Setting required fields in Salesforce can cause problems, especially when you are using record types. Consider if you want to enforce a rule that all Guardian contacts must have an email address. If you make the email address field required, it will also be required for Campers, which is not necessarily true. Enter validation rules, where you can make a field required, under certain conditions.

1. Click on the Cog icon () in the top right of the page, and click **Setup**
2. Click on the **Object Manager** tab at the top of the page
3. Within Object Manager, find the **Contact** object, and click on the label link
4. In the left navigation, click on **Validation Rules** and click **New**
  - 4.1. Set the rule name to **Guardian Email Required**
  - 4.2. In the error condition box set the formula to

```
RecordType.Name = "Guardian" && ISBLANK ( Email )
```

- 4.3. In the error message box set the text to **A guardian must have an email address**.
- 4.4. Set the error location to **Top of Page**



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. Under the 'Contact' object, the 'Validation Rules' tab is active. On the left, a sidebar lists various setup categories. The main area is titled 'Error Condition Formula' with an example 'Discount\_Percent\_c>0.30'. It includes a functions dropdown menu with options like ABS, AND, BEGIN, BLANKVALUE, BR, CASE, and ABS(number). Below the formula input field is a 'Check Syntax' button. The 'Error Message' section has an example 'Discount percent cannot exceed 30%', stating 'This message will appear when Error Condition formula is true'. It contains a text input field with the message 'A guardian must have an email address.' and an 'Error Location' dropdown set to 'Top of Page'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

#### 4.5. Click Save

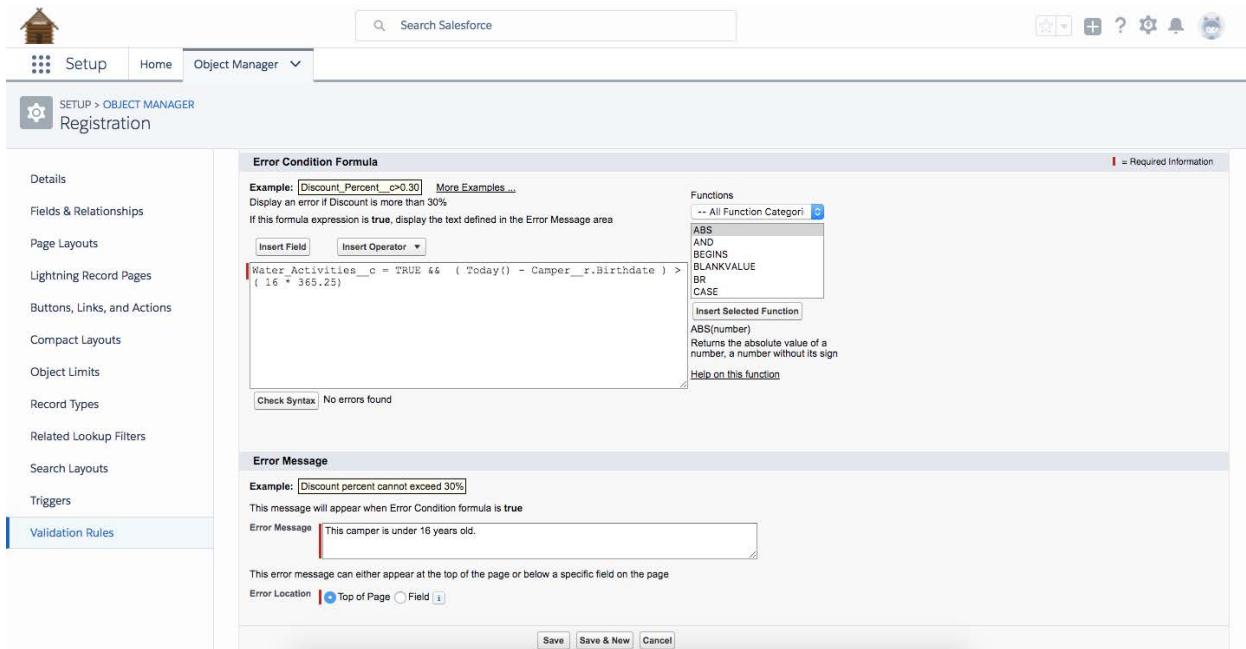
5. In the Global Search, search for **Cathrine Darcy** and click on the record
6. Click on the **Details** tab on the record
7. Click the pencil icon beside the **Email** field to edit
8. Delete the email address, and click **Save**
9. Confirm that the validation error pops up

Sweet! You have made the email field required, only for a Guardian contact. That is one example of where validation rules are effective. Another great use case is business validation. What if there was a business rule that Water Activities are only available for campers over the age of 16? You can use a validation rule to check that before saving a record.

10. Click on the Cog icon () in the top right of the page, and click **Setup**
11. Click on the **Object Manager** tab at the top of the page
12. Within Object Manager, find the **Registration** object, and click on the label link
13. In the left navigation, click on **Validation Rules** and click **New**
  - 13.1. Set the rule name to **Water Activity Age Check**
  - 13.2. In the error condition box set the formula to

```
Water_Activities__c = TRUE && ( Today() - Camper__r.Birthdate ) < ( 16 * 365.25 )
```

- 13.3. In the error message box set the text to **This camper is under 16 years old.**
- 13.4. Set the error location to **Top of Page**



### 13.5. Click Save

14. In the Global Search, search for **Sherry Howie** and click on the record
15. Locate the **Registrations** related list, and click on the **Registration Number** link
16. Click the pencil icon beside the **Water Activities** field to edit
17. Select the checkbox, and click **Save**
18. Confirm that the validation error pops up

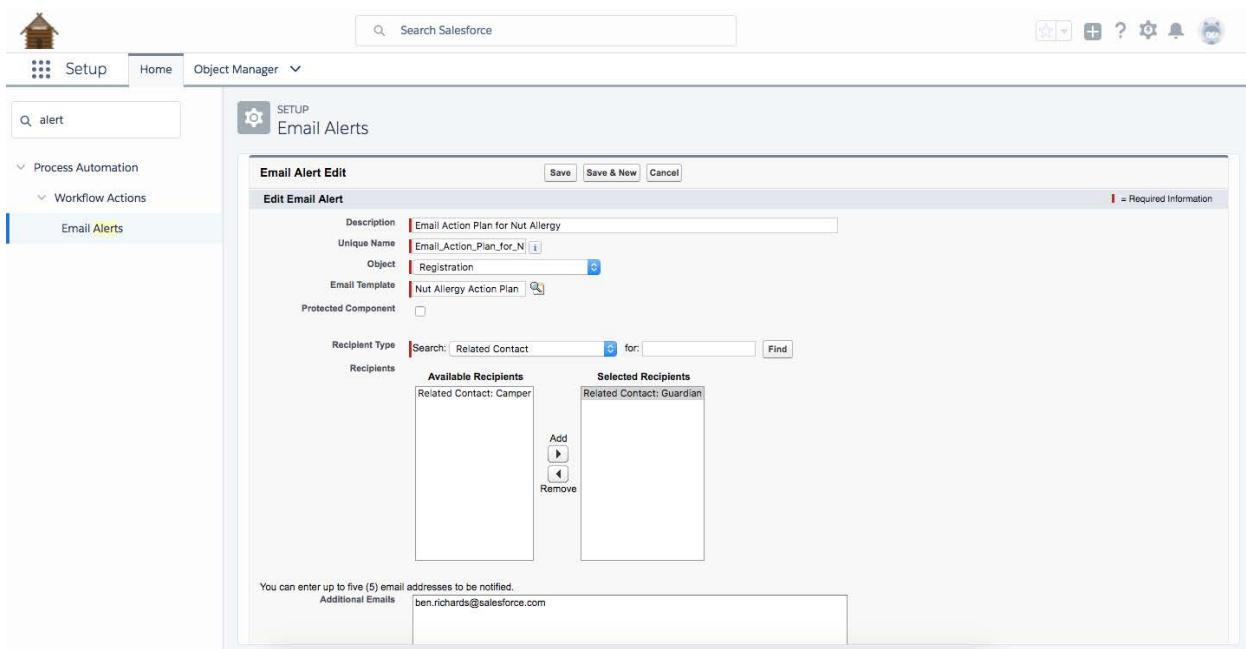
Safety first! You don't want to have your application get in the way of your business rules, and validation rules help to support that.

## Activity 2: Automating with Process Builder

The next type of logic and automation you are going to include is with Process Builder. Salesforce makes it easy to setup workflow by structuring if-this-than-that statement, and visually representing them in a process flow. At your camp, you want to notify the user to take action when a camper registers with a nut allergy, and you want to send the guardian an email with your action plan. First, you will need to build an email template, then you can setup the automated email alert.

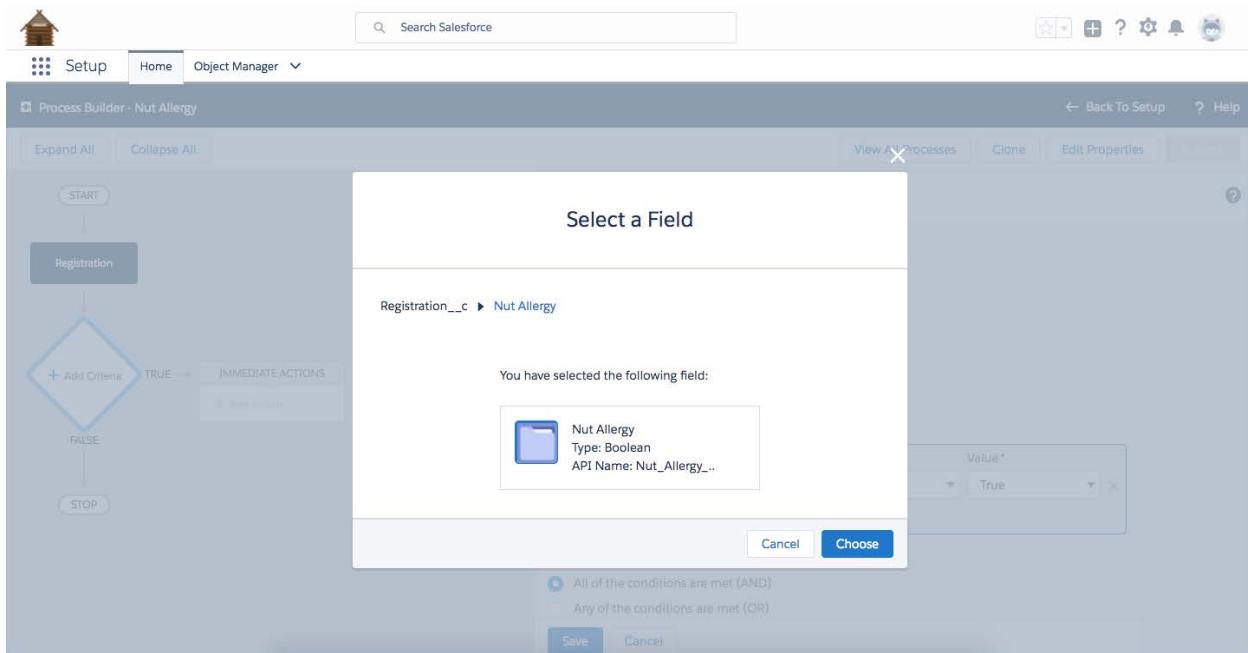
1. Click on the Cog icon () in the top right of the page, and click **Setup**
2. In the Quick Find search in the left navigation, start searching for **Template**, and select the menu link **Email Templates**
3. Click the **New Template** button
4. Select a **Text** template, and Click **Next**
  - 4.1. Select the checkbox for **Available for use**
  - 4.2. Set the email template name to **Nut Allergy Action Plan**
  - 4.3. Set the subject to **Our action plan for {!Registration\_\_c.Camper\_\_c}'s Nut Allergy**
  - 4.4. From the **HOAW-Master.zip** file you downloaded locate **EmailTemplate.txt**
  - 4.5. Set the email body with the text from **EmailTemplate.txt**
  - 4.6. Click **Save**

5. In the Quick Find search in the left navigation, start searching for **Alert**, and select the menu link **Email Alert**
6. Click the checkbox for **Do not show again** and continue
7. Click **New Email Alert**
  - 7.1. Set description as **Email Action Plan for Nut Allergy**
  - 7.2. Set unique name as **Email\_Action\_Plan\_for\_Nut\_Allergy**
  - 7.3. Select object as **Registration**
  - 7.4. Select the email template **Nut Allergy Action Plan**
  - 7.5. Set recipient type as **Related Contact**
  - 7.6. From the list of available recipients, select **Related Contact: Guardian**
  - 7.7. In the additional emails box, enter **your email** (so you can receive the notification as a test)



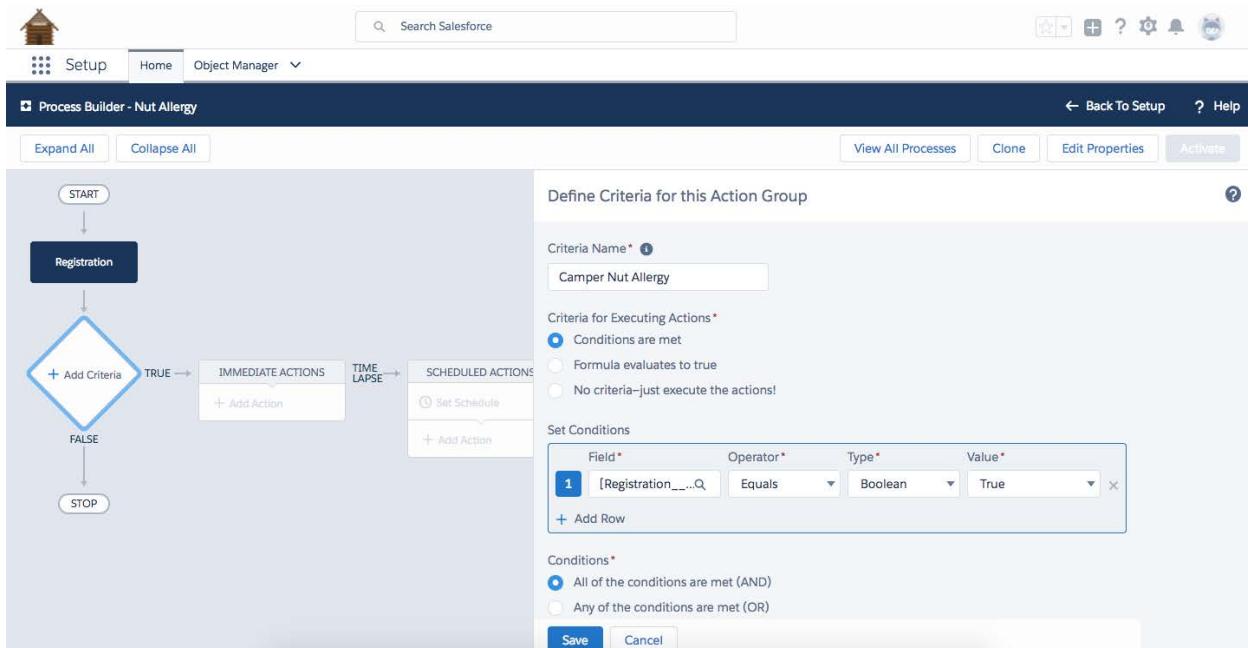
The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup' (selected), 'Home', and 'Object Manager'. A search bar at the top says 'Search Salesforce'. The main area is titled 'Email Alerts' under 'SETUP'. A sub-header 'Email Alert Edit' shows fields for 'Description' (Email Action Plan for Nut Allergy), 'Unique Name' (Email\_Action\_Plan\_for\_Nut\_Allergy), 'Object' (Registration), and 'Email Template' (Nut Allergy Action Plan). Below these are sections for 'Recipient Type' (set to 'Related Contact') and 'Recipients'. Under 'Recipients', there are two lists: 'Available Recipients' containing 'Related Contact: Camper' and 'Selected Recipients' containing 'Related Contact: Guardian'. Buttons for 'Add' and 'Remove' are between the lists. At the bottom, a note says 'You can enter up to five (5) email addresses to be notified.' and an 'Additional Emails' field contains 'ben.richards@salesforce.com'. A status bar at the bottom right indicates '1 Required Information'.

- 7.8. Click **Save**
8. In the Quick Find search in the left navigation, start searching for Process, and select the menu link **Process Builder**
9. Click **New**
10. Set the process name to **Nut Allergy**
11. Set the API name to **Nut\_Allergy**
12. Set the process to start when **A record changes**
13. Click **Save**
14. Click Add Object
  - 14.1. Select **Registration** from the dropdown
  - 14.2. Start the process when a record is created or edited
  - 14.3. Click **Save**
15. Click Add Criteria
  - 15.1. Set the criteria name to **Camper Nut Allergy**



The screenshot shows the Salesforce Process Builder interface for a process named "Process Builder - Nut Allergy". The process starts with a "Registration" step, followed by a decision diamond labeled "Nut Allergy". The "TRUE" path leads to an "IMMEDIATE ACTIONS" section containing a single action: "Set Nut Allergy = True". The "FALSE" path leads directly to a "STOP" step. A modal window titled "Select a Field" is open, showing the field "Nut Allergy" has been selected. The field is described as Type: Boolean, API Name: Nut\_Allergy\_\_c. A dropdown menu shows the value is set to "True". Buttons for "Cancel" and "Choose" are at the bottom of the modal.

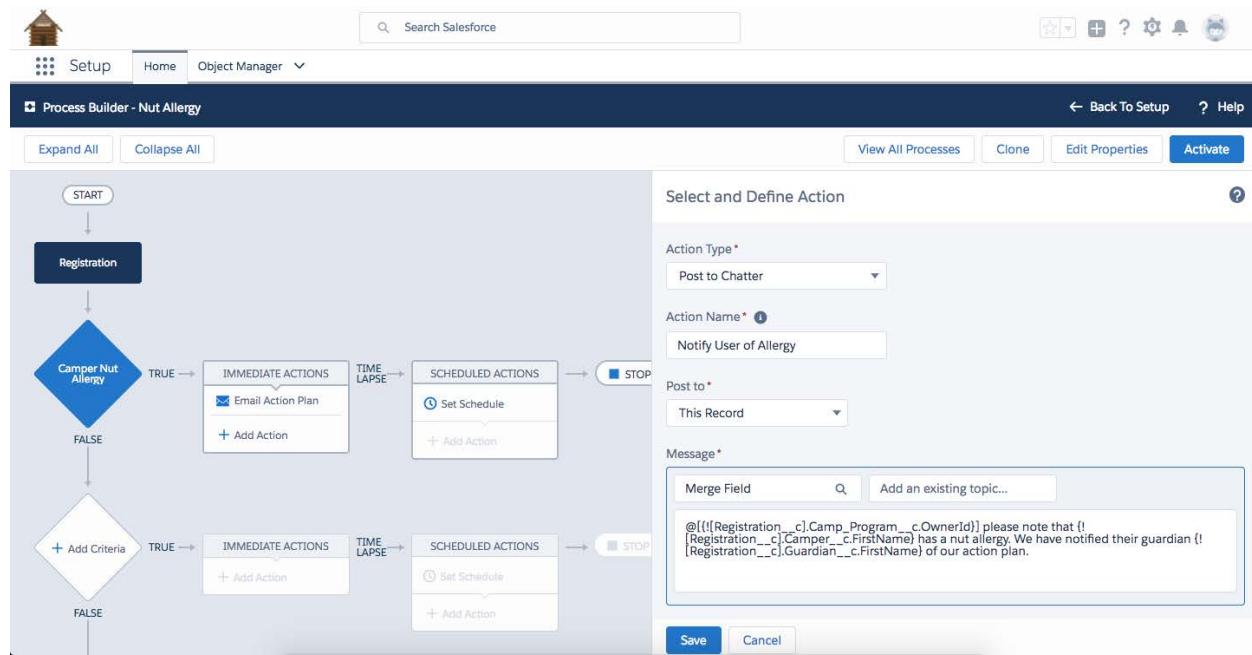
- 15.2. Set condition 1 to be the **Nut Allergy** field, with operator as **Equals**, type as **Boolean**, and value as **True**



The screenshot shows the "Define Criteria for this Action Group" screen. The "Criteria Name" is set to "Camper Nut Allergy". The "Criteria for Executing Actions" section has the radio button "Conditions are met" selected. The "Set Conditions" table contains one row: "Field": "Registration\_\_c", "Operator": "Equals", "Type": "Boolean", "Value": "True". The "Conditions" section below shows the radio button "All of the conditions are met (AND)" selected. Buttons for "Save" and "Cancel" are at the bottom.

- 15.3. Select the condition radio button for **All of the conditions are met (AND)**
- 15.4. Under Advanced, select the checkbox for **Yes**
- 15.5. Click **Save**
16. Click on **Add Action** under Immediate Actions
  - 16.1. Select action type **Email Alert**
  - 16.2. Set action name to **Email Action Plan**
  - 16.3. Set the email alert to **Email\_Action\_Plan\_for\_Nut\_Allergy**

17. Click on **Add Action** under Immediate Actions
  - 17.1. Select action type **Post to Chatter**
  - 17.2. Set action name to **Notify User of Allergy**
  - 17.3. Select post to as **This Record**
  - 17.4. From the **HOAW-Master.zip** file you downloaded locate **ChatterPost.txt**
  - 17.5. Set the message with the text from **ChatterPost.txt**



- 17.6. Click **Save**
18. Click **Activate**
19. Click **Back to Setup**
20. In the Global Search, search for **Sherry Howie** and click on the record
21. Locate the **Registrations** related list, and click on the **Registration Number** link
22. Click the pencil icon beside the **Nut Allergy** field to edit
23. Select the checkbox, and click **Save**
24. Click on the **Chatter** tab on the record to see the notification, and check your inbox for the email alert.

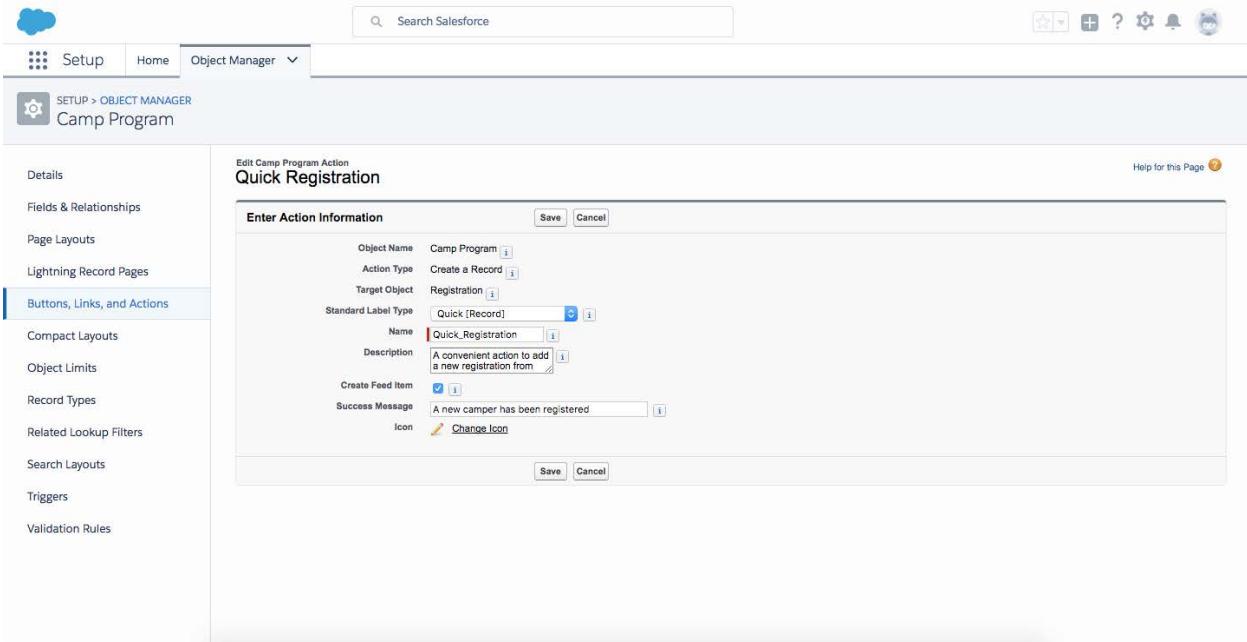
Congratulations, you have now setup automation around a use case for camper safety!

### Activity 3: Creating a Custom Quick Action

The last bit of logic that you will want to include in your app are quick actions, giving your users easy ways to create and update data, without having to do more work than necessary.

1. Click on the Cog icon () in the top right of the page, and click **Setup**
2. Click on the **Object Manager** tab at the top of the screen
3. Within Object Manager, find the **Camp Program** object, and click on the label link
4. From the left navigation, select **Buttons, Links, and Actions**, and click **New Action**
  - 4.1. Set the action type to **Create a Record**

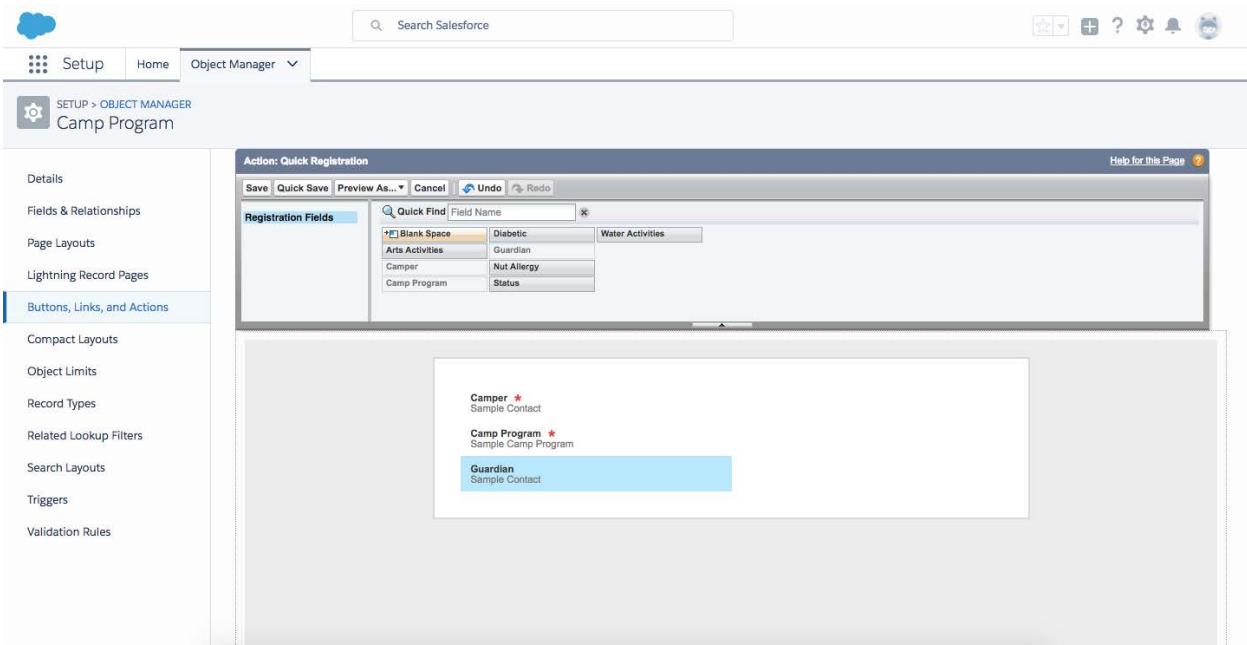
- 4.2. Set the target object to **Registration**
- 4.3. Set the standard label type to **Quick [Record]**
- 4.4. Set the name to **Quick\_Registration**
- 4.5. Select the checkbox for **Create Feed Item**
- 4.6. Set the success message to **A new camper has been registered**



The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new action is being created for the 'Camp Program' object. The 'Action Type' is set to 'Create a Record' and the 'Target Object' is 'Registration'. The 'Standard Label Type' is 'Quick [Record]' with the name 'Quick\_Registration'. The 'Success Message' is 'A new camper has been registered'. The 'Create Feed Item' checkbox is checked.

#### 4.7. Click **Save**

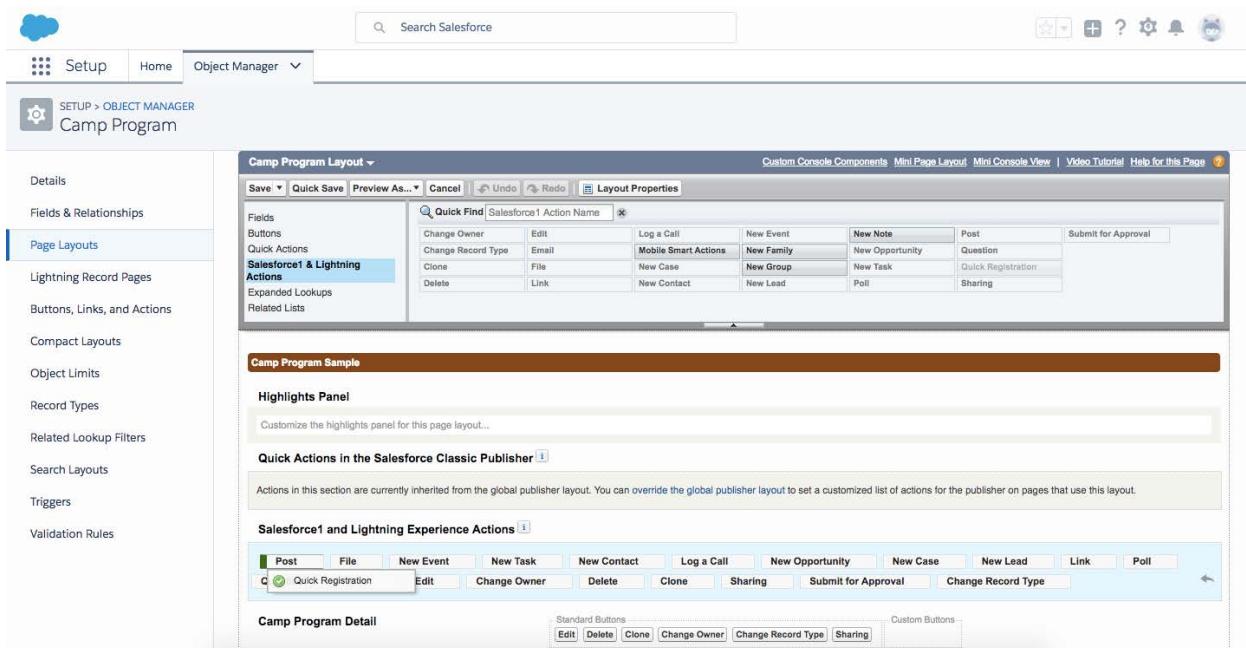
5. From the toolbox, drag in the fields for **Guardian**



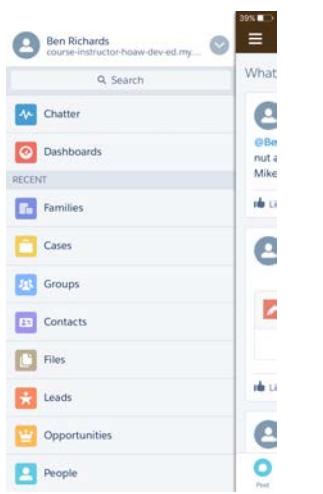
The screenshot shows the 'Action: Quick Registration' configuration screen. In the 'Registration Fields' section, several fields are listed: 'Blank Space', 'Arts Activities', 'Camper', 'Camp Program', 'Diabetic', 'Guardian', 'Nut Allergy', and 'Status'. The 'Guardian' field is highlighted with a blue selection bar. Below the fields, there is a preview area showing the 'Camper' and 'Camp Program' fields, with the 'Guardian' field also highlighted in blue.

6. In the toolbox, click **Save**
7. Under Predefined Field Values, click **New**

- 7.1. Set the field name to **Status**
- 7.2. Set the specific value to **Registered**
- 7.3. Click **Save**
8. From the left navigation, select **Page Layouts**, and click **Camp Program Layout**
9. In the toolbox, click **Salesforce1 and Lightning Actions**
10. Drag **Quick Registration** into the Salesforce1 and Lightning Experience Actions page section



11. In the toolbox, click **Save**
12. On your phone, open **Salesforce1** and click the menu link in the top left corner



13. In the navigation, click **More**, and select **Camp Programs**
14. Select the view **All**, and click **Camp Astro – City Adventures**
15. Click on **Quick Registration** in the bottom right corner



Camp Astro - City Adventures  
8/7/2017 - City Outdoor

**FEED** **DETAILS** **RELATED**

Camp Program Name  
**Camp Astro - City Adventures**

Start Date  
**8/7/2017**

End Date  
**8/11/2017**

Location  
**City Outdoor**

Camp Description  
A tour around the city! Let Astro guide you on an amazing urban adventure where you will learn fun skills, and valuable life lessons.

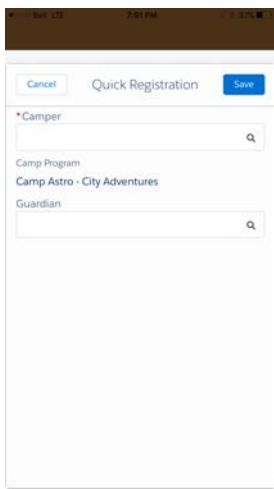
Owner  
**Ben Richards**

**AVAILABILITY**

Registered Campers

Quick Registration Post Fax New Event Show More

16. Set the Camper to **Susanne Darcy**
17. Set the Guardian to **Cathrine Darcy**



Quick Registration

**Camper**

**Guardian**

Cancel Quick Registration Save

18. Click **Save**

You have now created an easy way for a user to register a camper on a mobile device. You are almost done with your app, the last thing to do is setup reporting on your camp management.

## Module E: Reporting and Dashboards

Let's recap what you have accomplished so far. You have created a data model for camp management, set up a compelling user experience for your users, and designed logic and automation to make the application smart. The last thing to do is report on the data in your application. To do it, let's create reports that show us some key information, and organize them into a dashboard.

There are four types of reports that you can create in Salesforce:

- **Tabular** – A tabular report is used to show a table of data, best for organizing lists when you don't need to create charts

- **Summary** – Best used when you want to summarize, group, and display data in a chart. A summary report allows users to choose how to organize tabular data to create an insight
- **Matrix** – Summary reports allow you to group data on one dimension, while a matrix report allows you to group data on multiple dimensions
- **Joined** – Used to compare data across two different objects, with a common relationship on both. Joined reports are used infrequently, and can't be used to create charts

In addition to the different types of reports, you can also create dashboards to showcase the charts for your report data. Both reports and dashboards are stored in Folders, which allow for administrators to set how reports and dashboards can be shared.

Today, you are going to build a tabular, summary, and matrix report.

### *Activity 1: Create a Tabular Report*

The first report you are going to build will give camp managers a view into the youngest campers in their care. This report is specifically important to camp managers in the Wilderness programs.

1. Click the App Launcher logo (⋮) in the top left of the page, and select **The Campground App**
2. Click on the **Reports** tab at the top of the page
3. Click **New Folder** in the top right corner
4. Set the name to **Camp Management Reports**
5. Click **New Report** in the top right corner
6. In the quick find search box, search for **Registrations**, and select **Camp Programs with Registrations and Contacts**
7. Click **Create**
8. From the Fields toolbox, use the Quick Find search to find **Camper: First Name**
9. Add to the report by double-clicking **Camper: First Name**, or by dragging the field beside Camper: Last Name

The screenshot shows the Salesforce interface with the following details:

- Header:** The Campground, Search bar, and various navigation tabs: Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar.
- Report Type:** Camp Programs with Registrations and Contacts
- Section:** Unsaved Report
- Buttons:** Save, Save As, Close, Report Properties
- Fields:** A list of fields including Camper: First Name, Camper: General, and Camper: Last Name.
- Filters:** Set to "My camp programs". Date range from End Date to All Time.
- Preview:** Tabular Format showing data for Camp Program, Registration Number, and Camper's Last Name. A checkbox for Camper: First Name is shown in a callout box over the preview table.

Camp Program: Camp Program Name	Registration: Registration Number	Camper: Last Name
Camp Codey - Learn to Code Academy	CR-000077	Kezar
Camp Cloudy - Challenge Nature	CR-000078	Presshaug
Camp Cloudy - Challenge Nature	CR-000079	Wickwarth
Camp Astro - Outdoor Adventures	CR-000080	Haldin
Camp Codey - Learn to Code Academy	CR-000081	Erigo
Camp Astro - Outdoor Adventures	CR-000082	Oddboy
Camp Einstein - Changing the World	CR-000083	Desborough
Camp Codey - Interactive Computing	CR-000084	Inderwick
Camp Astro - City Adventures	CR-000085	Kobierski
Camp Astro - Explorers Paradise	CR-000086	De Francesco
Camp Trailhead - Let the Badging Begin	CR-000087	Mary
Camp Codey - Interactive Computing	CR-000088	Clementel
Camp Trailhead - Skies the Limit	CR-000089	Milverton
Camp Codey - Learn to Code Academy	CR-000090	Derry
Camp Codey - Learn to Code Academy	CR-000091	Fleg

10. From the Fields toolbox, use the Quick Find search to find **Birthdate**
  11. Add to the report by double-clicking **Camper: Birthdate**, or by dragging the field beside Camper: Last Name
  12. Under the Filter toolbox, click **Add**
    - 12.1. Set the field to **Location**
    - 12.2. Set the operator to **Equals**
    - 12.3. Set the value to **Wilderness**
    - 12.4. Click **Ok**

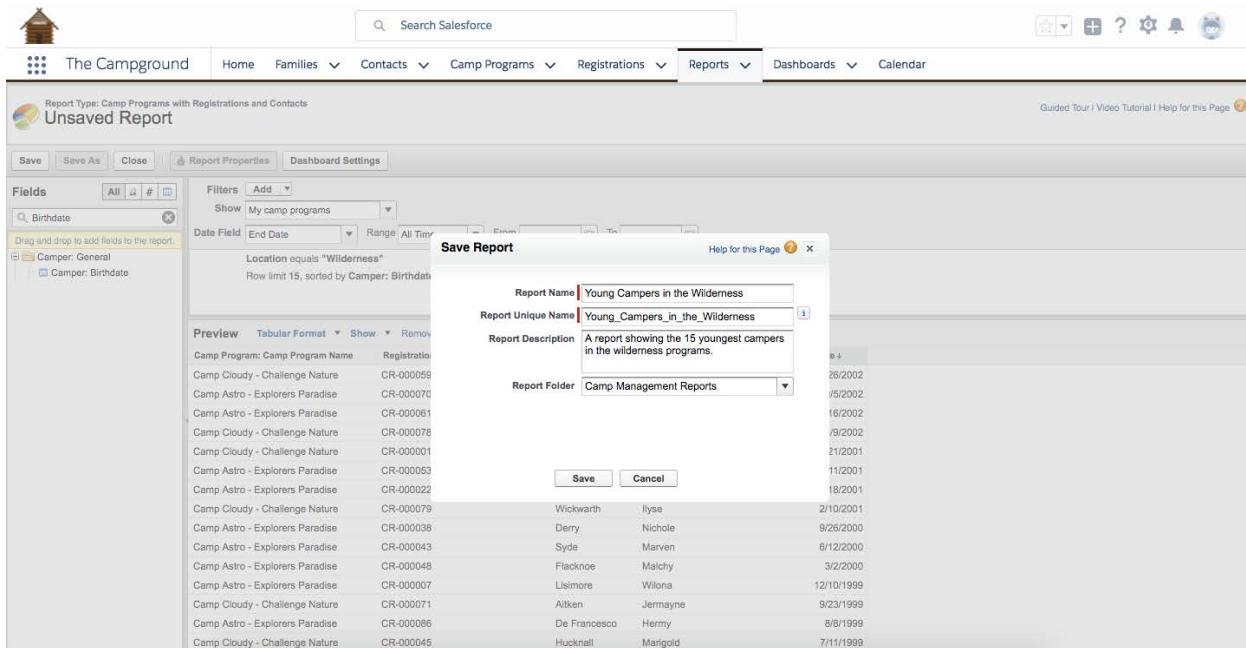
The screenshot shows the Salesforce interface with the following details:

- Header:** The Campground, Search bar, and various navigation tabs: Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar.
- Section:** Report Type: Camp Programs with Registrations and Contacts
- Buttons:** Save, Save As, Close, Report Properties
- Fields:** Birthdate, Date Field (End Date), Location (set to Wilderness)
- Preview:** Tabular Format, showing a list of campers with their last names, first names, and birthdates.

Camp Program	Camp Program Name	Registration: Registration Number	Camper: Last Name	Camper: First Name	Camper: Birthdate
Camp Cloudy - Challenge Nature		CR-000001	Lumsden	Zebadiah	10/21/2001
Camp Astro - Explorers Paradise		CR-000007	Ulismore	Wilona	12/10/1999
Camp Astro - Explorers Paradise		CR-000022	Carlesso	Shawn	6/18/2001
Camp Astro - Explorers Paradise		CR-000038	Derry	Nichole	9/28/2000
Camp Astro - Explorers Paradise		CR-000043	Syde	Marven	6/12/2000
Camp Cloudy - Challenge Nature		CR-000045	Hucknall	Marigold	7/11/1999
Camp Astro - Explorers Paradise		CR-000048	Flacknoe	Malchy	3/2/2000
Camp Astro - Explorers Paradise		CR-000053	Gromley	Lindsay	9/11/2001
Camp Cloudy - Challenge Nature		CR-000059	O'Brolachain	Kisse	9/26/2002
Camp Astro - Explorers Paradise		CR-000061	Comins	Ketti	7/16/2002
Camp Astro - Explorers Paradise		CR-000070	Veart	Jonathan	9/5/2002
Camp Cloudy - Challenge Nature		CR-000071	Aitken	Jermayne	9/23/1999
Camp Cloudy - Challenge Nature		CR-000078	Presshaugh	Ingrid	3/9/2002
Camp Cloudy - Challenge Nature		CR-000079	Wickwarth	Ilyse	2/10/2001
Camp Astro - Explorers Paradise		CR-000086	De Francesco	Hermv	8/8/1999

13. Under the Filter toolbox click the **Carrot** button (▼) beside Add, and select **Row Limit**

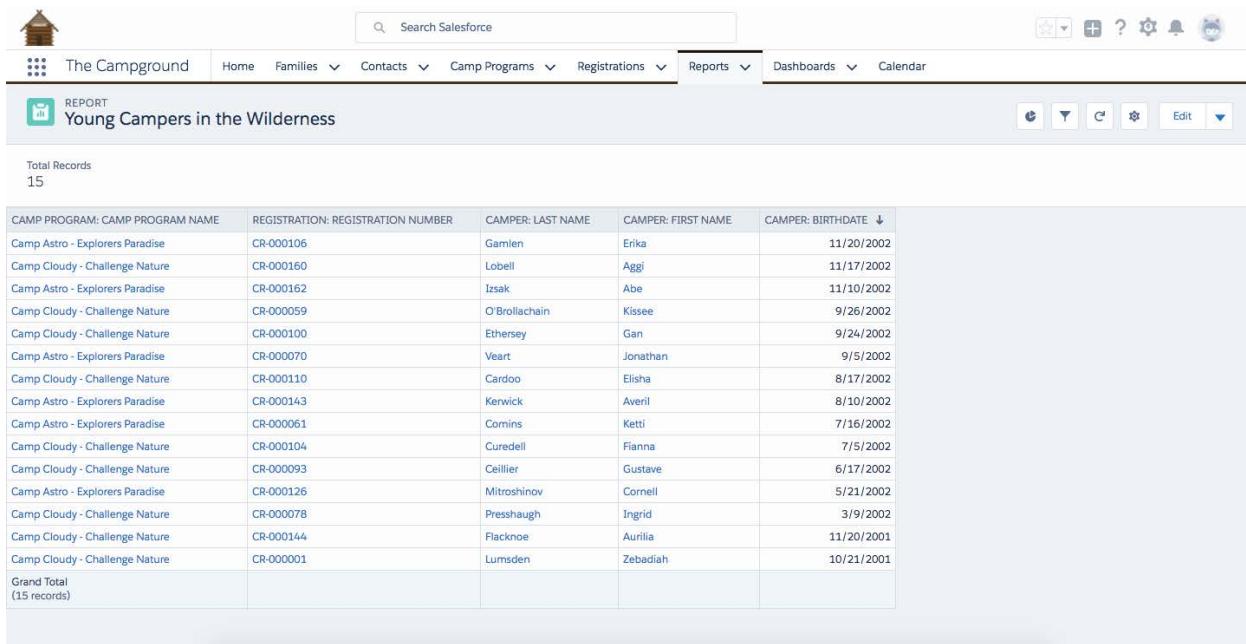
- 13.1. Set row limit to **15**
- 13.2. Set sorted by to **Camper: Birthdate**
- 13.3. Set direction to **Descending**
- 13.4. Click **Ok**
14. Click **Save**
- 14.1. Set the report name to **Young Campers in the Wilderness**
- 14.2. Set the report unique name to **Young\_Campers\_in\_the\_Wilderness**
- 14.3. Set the report folder to **Camp Management Reports**



**Save Report**

CAMP PROGRAM: CAMP PROGRAM NAME	REGISTRATION: REGISTRATION NUMBER	CAMPER: LAST NAME	CAMPER: FIRST NAME	CAMPER: BIRTHDATE
Camp Astro - Explorers Paradise	CR-000106	Garnlen	Erika	11/20/2002
Camp Cloudy - Challenge Nature	CR-000160	Lobell	Aggi	11/17/2002
Camp Astro - Explorers Paradise	CR-000162	Izsak	Abe	11/10/2002
Camp Cloudy - Challenge Nature	CR-000059	O'Brollachain	Kissee	9/26/2002
Camp Cloudy - Challenge Nature	CR-000100	Ethersey	Gan	9/24/2002
Camp Astro - Explorers Paradise	CR-000070	Veart	Jonathan	9/5/2002
Camp Cloudy - Challenge Nature	CR-000110	Cardoo	Elisha	8/17/2002
Camp Astro - Explorers Paradise	CR-000143	Kerwick	Averil	8/10/2002
Camp Astro - Explorers Paradise	CR-000061	Comins	Ketti	7/16/2002
Camp Cloudy - Challenge Nature	CR-000104	Curedell	Fianna	7/5/2002
Camp Cloudy - Challenge Nature	CR-000093	Ceillier	Gustave	6/17/2002
Camp Astro - Explorers Paradise	CR-000126	Mitroshinov	Cornell	5/21/2002
Camp Cloudy - Challenge Nature	CR-000078	Presshaugh	Ingrid	3/9/2002
Camp Cloudy - Challenge Nature	CR-000144	Flacknoe	Aurilia	11/20/2001
Camp Cloudy - Challenge Nature	CR-000001	Lumsden	Zebadiah	10/21/2001
Grand Total (15 records)				

15. Click Run Report



CAMP PROGRAM: CAMP PROGRAM NAME	REGISTRATION: REGISTRATION NUMBER	CAMPER: LAST NAME	CAMPER: FIRST NAME	CAMPER: BIRTHDATE
Camp Astro - Explorers Paradise	CR-000106	Garnlen	Erika	11/20/2002
Camp Cloudy - Challenge Nature	CR-000160	Lobell	Aggi	11/17/2002
Camp Astro - Explorers Paradise	CR-000162	Izsak	Abe	11/10/2002
Camp Cloudy - Challenge Nature	CR-000059	O'Brollachain	Kissee	9/26/2002
Camp Cloudy - Challenge Nature	CR-000100	Ethersey	Gan	9/24/2002
Camp Astro - Explorers Paradise	CR-000070	Veart	Jonathan	9/5/2002
Camp Cloudy - Challenge Nature	CR-000110	Cardoo	Elisha	8/17/2002
Camp Astro - Explorers Paradise	CR-000143	Kerwick	Averil	8/10/2002
Camp Astro - Explorers Paradise	CR-000061	Comins	Ketti	7/16/2002
Camp Cloudy - Challenge Nature	CR-000104	Curedell	Fianna	7/5/2002
Camp Cloudy - Challenge Nature	CR-000093	Ceillier	Gustave	6/17/2002
Camp Astro - Explorers Paradise	CR-000126	Mitroshinov	Cornell	5/21/2002
Camp Cloudy - Challenge Nature	CR-000078	Presshaugh	Ingrid	3/9/2002
Camp Cloudy - Challenge Nature	CR-000144	Flacknoe	Aurilia	11/20/2001
Camp Cloudy - Challenge Nature	CR-000001	Lumsden	Zebadiah	10/21/2001
Grand Total (15 records)				

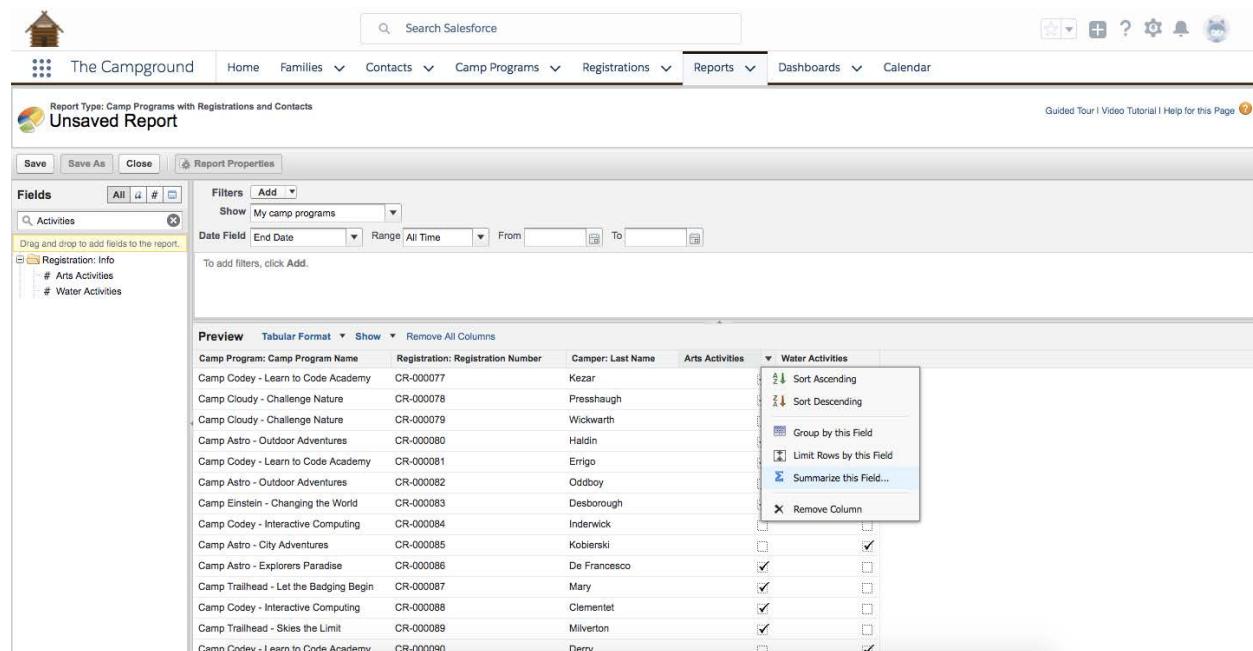
You now have a report that shows us the 15 youngest campers registered in a camp program in the Wilderness!

Next, let's build a summary report for your app.

## Activity 2: Create a Summary Report

Camp managers also want to know how many supplies they need for camps based on campers registered in special activities. Let's create a report that provides them this information.

1. Click on the **Reports** tab at the top of the page
2. Click **New Report** in the top right corner
3. In the quick find search box, search for **Registrations**, and select **Camp Programs with Registrations and Contacts**
4. Click **Create**
5. From the Fields toolbox, use the Quick Find search to find **Activities**
6. Add to the report by double-clicking **Arts Activities**, or by dragging the field beside Camper: Last Name
7. Add to the report by double-clicking **Water Activities**, or by dragging the field beside Camper: Last Name
8. In the preview table, click **carrot** button () in the column header for Arts Activities, and click **Summarize this field...**
  - 8.1. Select the checkbox for **Sum**
  - 8.2. Click **Apply**

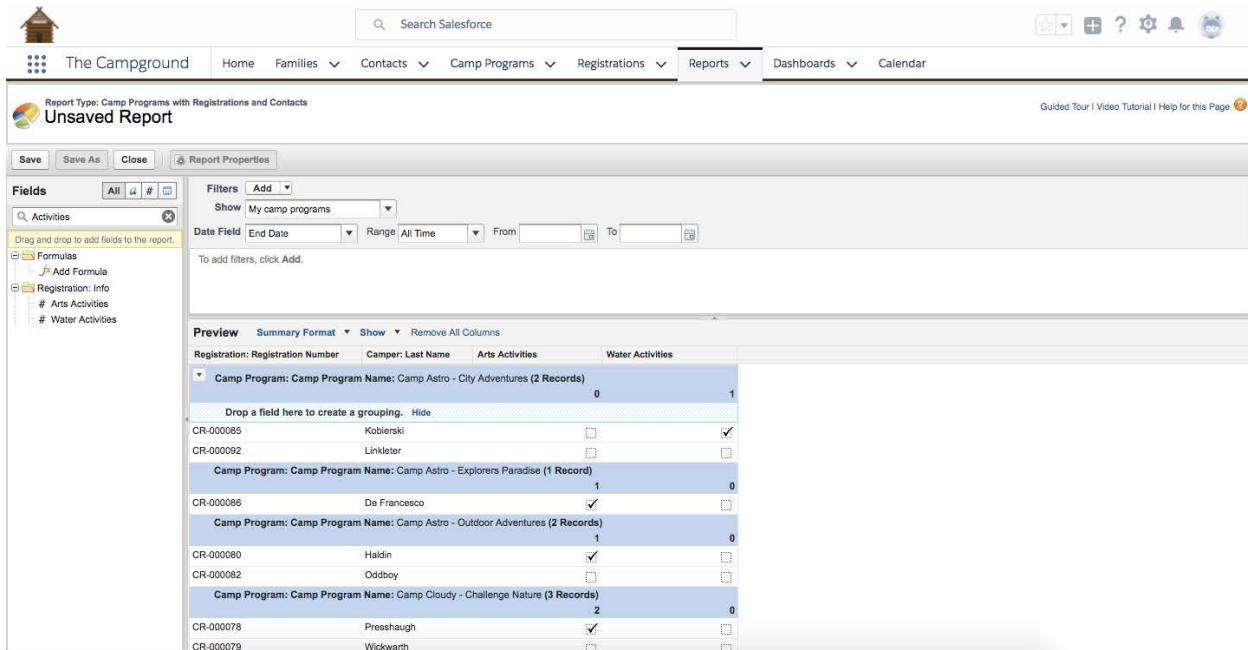


The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes 'The Campground' icon, 'Home', 'Families', 'Contacts', 'Camp Programs', 'Registrations', 'Reports', 'Dashboards', and 'Calendar'. The 'Reports' tab is active. A sub-header indicates the report type: 'Report Type: Camp Programs with Registrations and Contacts' and 'Saved Report'. The main area shows a table with columns: 'Camp Program: Camp Program Name', 'Registration: Registration Number', 'Camper: Last Name', 'Arts Activities', and 'Water Activities'. The 'Arts Activities' column has a dropdown menu open with options: 'Sort Ascending', 'Sort Descending', 'Group by this Field', 'Limit Rows by this Field', 'Summarize this Field...', and 'Remove Column'. The 'Summarize this Field...' option is highlighted with a blue border. The table data lists various camp programs and their details.

Camp Program: Camp Program Name	Registration: Registration Number	Camper: Last Name	Arts Activities	Water Activities
Camp Codye - Learn to Code Academy	CR-000077	Kezar		
Camp Cloudy - Challenge Nature	CR-000078	Presshaugh		
Camp Cloudy - Challenge Nature	CR-000079	Wickwarth		
Camp Astro - Outdoor Adventures	CR-000080	Haldin		
Camp Codye - Learn to Code Academy	CR-000081	Errigo		
Camp Astro - Outdoor Adventures	CR-000082	Odbboy		
Camp Einstein - Changing the World	CR-000083	Desborough		
Camp Codye - Interactive Computing	CR-000084	Inderwick		
Camp Astro - City Adventures	CR-000085	Kobierski		
Camp Astro - Explorers Paradise	CR-000086	De Francesco		
Camp Trailhead - Let the Badging Begin	CR-000087	Mary		
Camp Codye - Interactive Computing	CR-000088	Clementet		
Camp Trailhead - Skies the Limit	CR-000089	Milverton		
Camp Codye - Learn to Code Academy	CR-000090	Derry		

9. In the preview table, click **carrot** button () in the column header for Water Activities, and click **Summarize this field...**
  - 9.1. Select the checkbox for **Sum**
  - 9.2. Click **Apply**

10. In the preview table, click **carrot** button () in the column header for Camp Program: Camp Program Name, and click **Group by this Field**



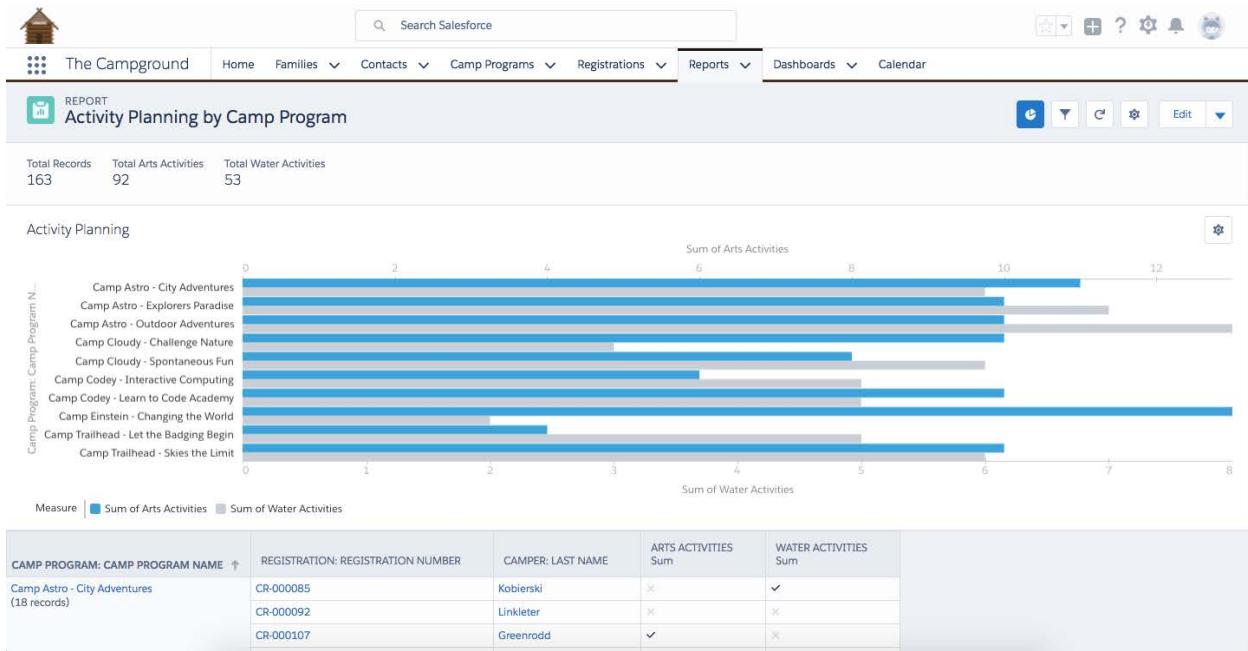
Registration	Registration Number	Camper: Last Name	Arts Activities	Water Activities
<b>Camp Program: Camp Program Name: Camp Astro - City Adventures (2 Records)</b>				
CR-000085	Kobierski	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
CR-000092	Linklater	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Camp Program: Camp Program Name: Camp Astro - Explorers Paradise (1 Record)</b>				
CR-000086	De Francesco	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Camp Program: Camp Program Name: Camp Astro - Outdoor Adventures (2 Records)</b>				
CR-000080	Haldin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CR-000082	Oddboy	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>Camp Program: Camp Program Name: Camp Cloudy - Challenge Nature (3 Records)</b>				
CR-000078	Presshaugh	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CR-000079	Wickwarth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. Click **Save**

- 11.1. Set the report name to Activity Planning by Camp Program
- 11.2. Set the report unique name to Activity\_Planning\_by\_Camp\_Program
- 11.3. Set the report folder to **Camp Management Reports**

12. Click Run Report

13. Click on the **chart** button () at the top of the report
14. Click on the **cog** button () in the chart area
  - 14.1. Set the display as to **Horizontal Bar Chart**
  - 14.2. Set chart title to **Activity Planning**
  - 14.3. Set X-Axis to Sum of Arts Activities
  - 14.4. Add a Second Axis
  - 14.5. Set second axis to Sum of Water Activities
  - 14.6. Set legend position as **Bottom**
  - 14.7. Click on the **cog** button () in the chart area



15. Click the **carrot** button ( at the top of the report, and click **Save**

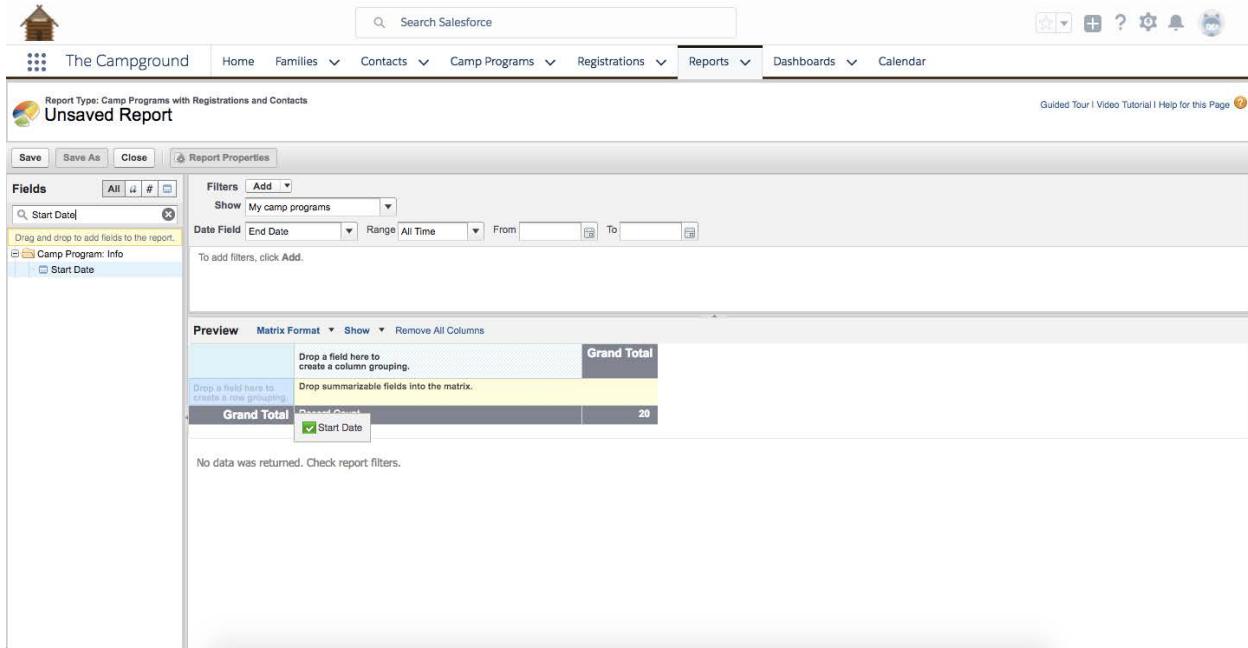
Now camp managers have easy access to a report to help them prepare for each camp!

Next, let's build a matrix report.

### Activity 3: Create a Matrix Report

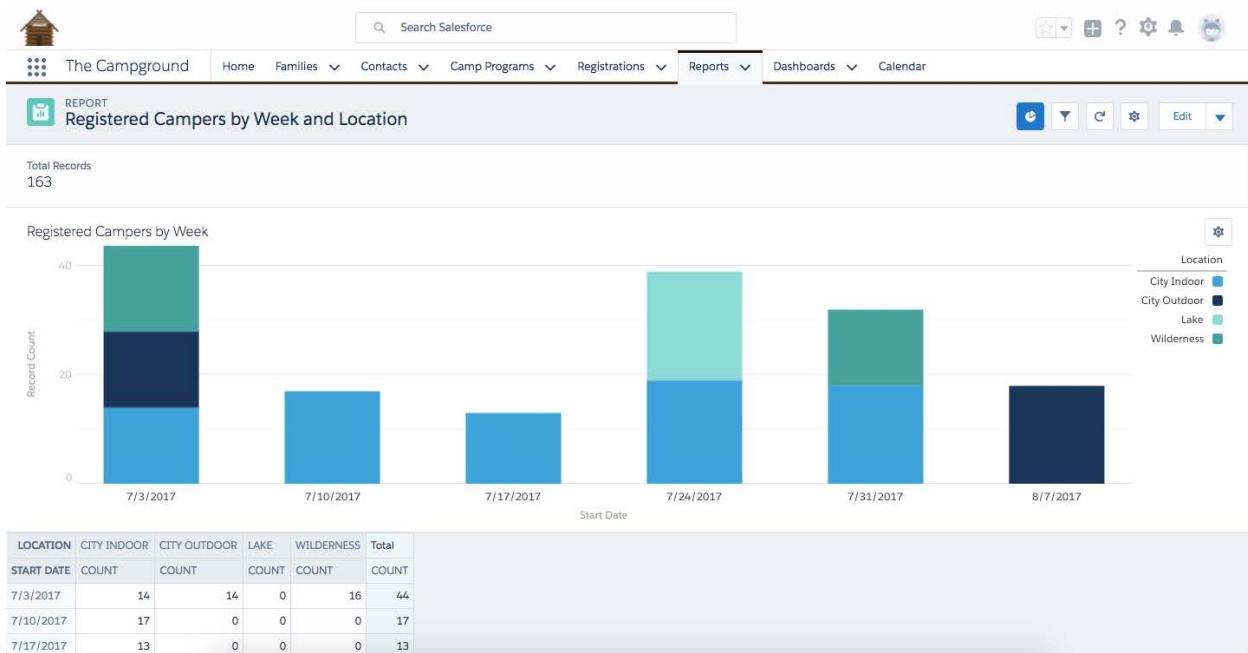
As camp administrators, you might want to plan your hiring based on the number of campers registered each week. In addition, you might want to hire specific staff based on where they will be working. Let's create a report that will provide this insight.

1. Click on the **Reports** tab at the top of the page
2. Click **New Report** in the top right corner
3. In the quick find search box, search for **Registrations**, and select **Camp Programs with Registrations and Contacts**
4. Click **Create**
5. In the preview table, click on **Tabular Format** and switch to **Matrix**
6. In the preview table, click on **Show** and uncheck **Details**
7. From the Fields toolbox, use the Quick Find search to find **Start Date**
8. Add to the report by dragging the field **Start Date** into the **Row Grouping** drop zone



The screenshot shows the Salesforce Report Builder interface. At the top, there's a navigation bar with links like Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar. Below the navigation is a search bar labeled "Search Salesforce". The main area is titled "Report Type: Camp Programs with Registrations and Contacts" and "Unsaved Report". On the left, there's a "Fields" toolbox with a "Start Date" field selected. In the center, there are "Filters" and "Show" dropdowns set to "My camp programs". The "Date Field" is set to "End Date" with "Range" set to "All Time". Below these are buttons for "Save", "Save As", "Close", and "Report Properties". The "Preview" section shows a matrix format with a single row. The first column is "Grand Total" and the second column is "Record Count". Under "Record Count", there's a checkbox for "Start Date" which is checked. The value "20" is displayed in the cell. A note below says "No data was returned. Check report filters.".

9. From the Fields toolbox, use the Quick Find search to find **Location**
10. Add to the report by dragging the field **Location** into the **Column Grouping** drop zone
11. Click **Save**
  - 11.1. Set the report name to Registered Campers by Week and Location
  - 11.2. Set the report unique name to Registered\_Campers\_by\_Week\_and\_Location
  - 11.3. Set the report folder to **Camp Management Reports**
12. Click Run Report
13. Click on the **chart** button () at the top of the report
14. Click on the **cog** button () in the chart area
  - 14.1. Set the display as to Stacked Vertical Bar Chart
  - 14.2. Set chart title to Registered Campers by Week
  - 14.3. Set Y-Axis to Record Count
  - 14.4. Set legend position as **Right**
  - 14.5. Click on the **cog** button () in the chart area



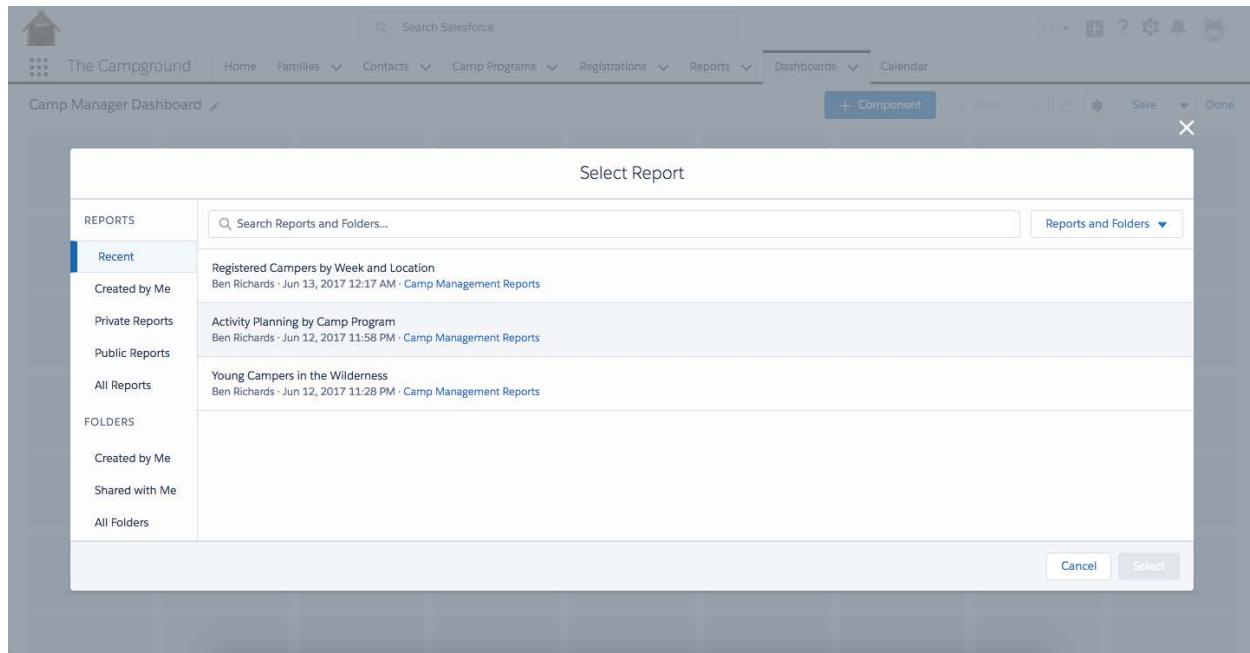
15. Click the **carrot** button () at the top of the report, and click **Save**

Congratulations, you have now finished creating your reports! Let's complete your reporting by building a dashboard to show your summary and matrix report for quick viewing.

## Activity 4: Create a Dashboard

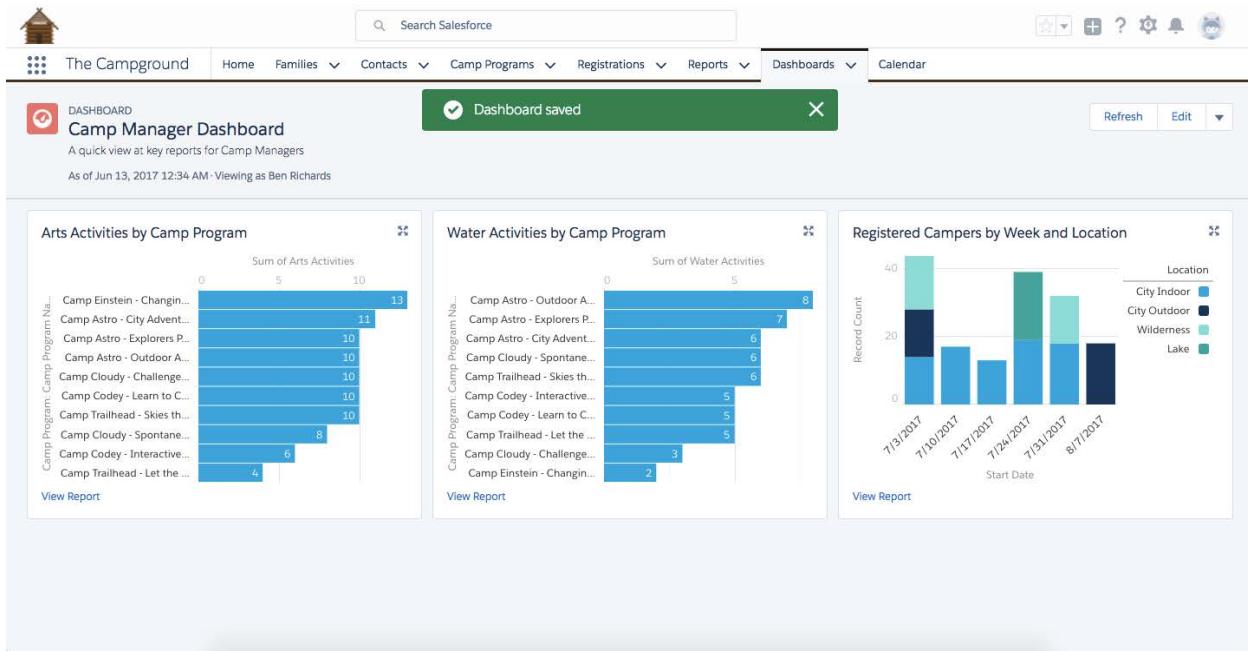
As an administrator, you will want to make sure that your users have easier access to viewing report data. Let's create a Camp Manager Dashboard that has the two key reports you have built.

1. Click on the **Dashboards** tab at the top of the page
2. Click on **New Report**
3. Set the name a **Camp Management Dashboards**
4. Click on **New Dashboard**
5. Set the name as **Camp Manager Dashboard**
6. Set the folder to **Camp Management Dashboards**
7. Click **Create**
8. Click **+** **Component**
  - 8.1. Select **Activity Planning by Camp Program**



The screenshot shows the Salesforce interface for a 'Camp Manager Dashboard'. At the top, there's a navigation bar with links for Home, Families, Contacts, Camp Programs, Registrations, Reports, Dashboards, and Calendar. Below the navigation is a toolbar with icons for New, Edit, Delete, Save, and Done. A modal window titled 'Select Report' is open in the center. The modal has a sidebar on the left with categories: REPORTS (Recent, Created by Me, Private Reports, Public Reports, All Reports) and FOLDERS (Created by Me, Shared with Me, All Folders). The main area contains a search bar labeled 'Search Reports and Folders...' and a list of reports. The first report listed is 'Registered Campers by Week and Location' (Ben Richards - Jun 13, 2017 12:17 AM · Camp Management Reports). Below it are 'Activity Planning by Camp Program' (Ben Richards - Jun 12, 2017 11:58 PM · Camp Management Reports) and 'Young Campers in the Wilderness' (Ben Richards - Jun 12, 2017 11:28 PM · Camp Management Reports). At the bottom right of the modal are 'Cancel' and 'Select' buttons.

- 8.2. Click **Select**
- 8.3. Set X-Axis to **Sum of Arts Activities**
- 8.4. Set title to **Arts Activities by Camp Program**
- 8.5. Click **Add**
9. Click **+ Component**
  - 9.1. Select **Activity Planning by Camp Program**
  - 9.2. Click **Select**
  - 9.3. Set X-Axis to **Sum of Water Activities**
  - 9.4. Set title to **Water Activities by Camp Program**
  - 9.5. Click **Add**
10. Click **+ Component**
  - 10.1. Select **Registered Campers by Week and Location**
  - 10.2. Click **Select**
  - 10.3. Set display as **Stacked Vertical Bar Chart**
  - 10.4. Set X-Axis to **Start Date**
  - 10.5. Set stacked by to **Location**
  - 10.6. Set sort rows by **Label Ascending**
  - 10.7. Set title to **Registered Campers by Week and Location**
  - 10.8. Click **Add**
11. Rearrange the Dashboard by dragging the components to the top row
12. Click **Save** at the top of the page
13. Click **Done**



The screenshot shows the Salesforce Lightning interface with the 'Camp Manager Dashboard' open. At the top, there's a search bar and a navigation bar with links like 'Home', 'Families', 'Contacts', 'Camp Programs', 'Registrations', 'Reports', 'Dashboards', and 'Calendar'. A green banner at the top right indicates that the dashboard has been saved. The dashboard itself contains three main charts:

- Arts Activities by Camp Program**: A horizontal bar chart showing the sum of arts activities for various camp programs. The data is as follows:
 

Camp Program Name	Sum of Arts Activities
Camp Einstein - Changin...	13
Camp Astro - City Advent...	11
Camp Astro - Explorers P...	10
Camp Astro - Outdoor A...	10
Camp Astro - Outdoor A...	10
Camp Cloudy - Challenge...	10
Camp Codey - Learn to C...	10
Camp Trailhead - Skies th...	10
Camp Cloudy - Spontane...	8
Camp Codey - Interactive...	6
Camp Trailhead - Let the ...	4
- Water Activities by Camp Program**: A horizontal bar chart showing the sum of water activities for various camp programs. The data is as follows:
 

Camp Program Name	Sum of Water Activities
Camp Astro - Outdoor A...	8
Camp Astro - Explorers P...	7
Camp Astro - City Advent...	6
Camp Cloudy - Spontane...	6
Camp Trailhead - Skies th...	6
Camp Codey - Interactive...	5
Camp Codey - Learn to C...	5
Camp Trailhead - Let the ...	5
Camp Cloudy - Challenge...	3
Camp Einstein - Changin...	2
- Registered Campers by Week and Location**: A stacked bar chart showing the record count of registered campers by week and location. The data is as follows:
 

Start Date	City Indoor	City Outdoor	Wilderness	Lake
7/3/2017	15	10	10	5
7/10/2017	18	10	10	5
7/17/2017	15	10	10	5
7/24/2017	20	10	10	5
7/31/2017	18	10	10	5
8/7/2017	15	10	10	5

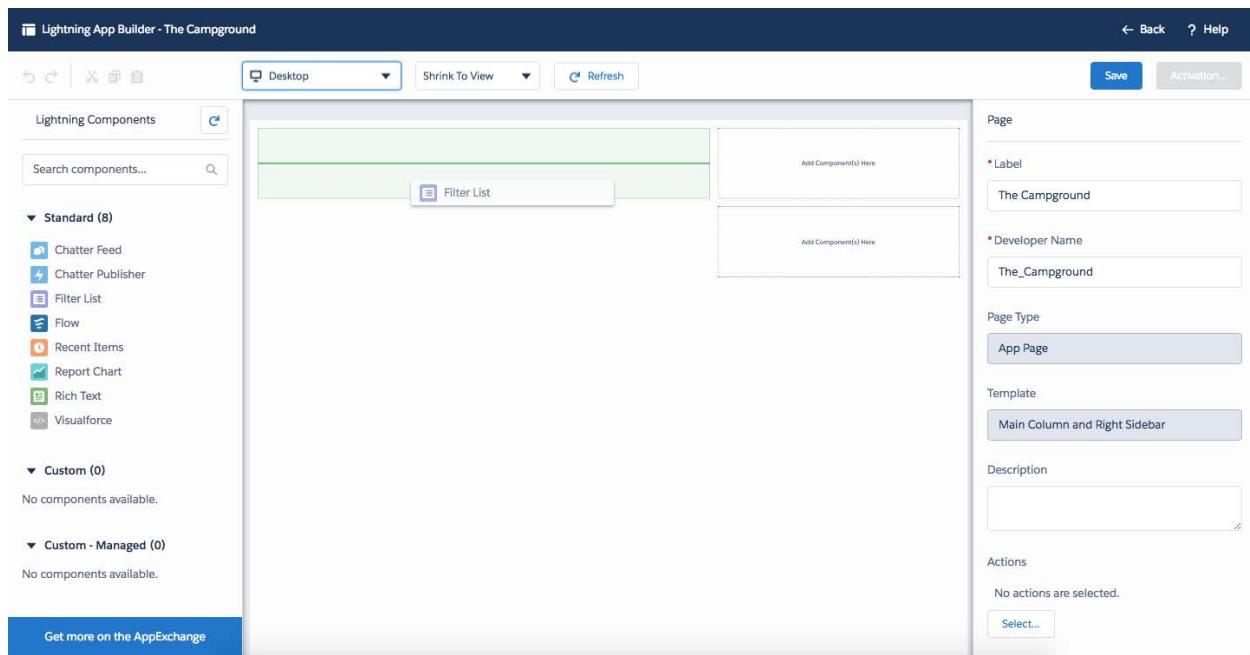
Awesome! You now have a dashboard that camp managers can use to manage their camps.

## Extra Credit Activity: Building an App Page for Camp Management

Dashboards are the gold standard in organizing and sharing reports within Salesforce. However, they have their limits – dashboards can only display report charts, no other information. As an administrator, you have a secret tool in your back pocket – app pages!

App pages allow you to create a page in your application that is tailor made for your use case, that can include reports, list views, rich text, and other components. Let's explore how you can build an app page.

1. Click on the Cog icon () in the top right of the page, and click **Setup**
2. In the Quick Find search in the left navigation, start searching for **App Builder**, and select the menu link **Lightning App Builder**
3. Click on **New**
4. Select **App Page**
5. Set the name to **The Campground**
6. Set the template to **Main Column and Right Sidebar**
7. At the top of the page, click **Phone**, and select **Desktop**
8. From the Lightning Component toolbox, drag the **Filter List** component into the larger column

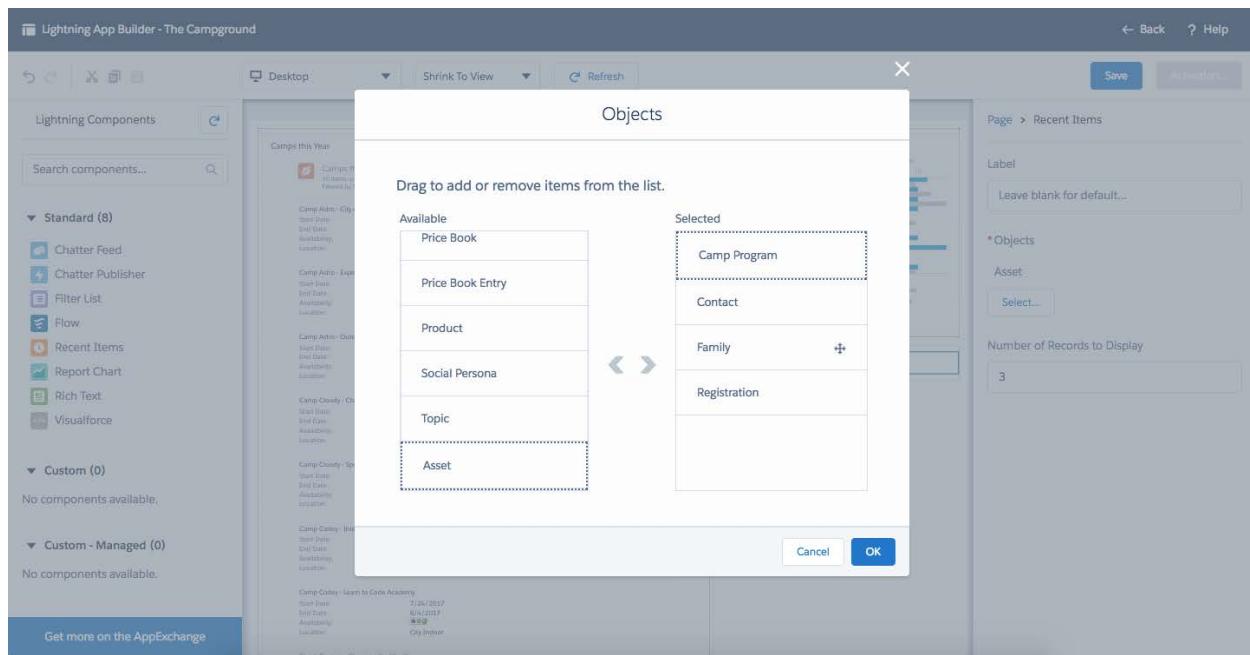


The screenshot shows the Lightning App Builder interface. On the left, there's a sidebar with a 'Lightning Components' section containing a search bar and categories for 'Standard (8)' and 'Custom (0)'. Under 'Standard (8)', components like Chatter Feed, Chatter Publisher, Filter List, Flow, Recent Items, Report Chart, Rich Text, and Visualforce are listed. On the right, the main workspace has two columns: an upper column with a 'Filter List' component and a lower column with an empty placeholder 'Add Component(s) Here'. To the right of the workspace is a properties panel for a 'Page' object. The properties include:

- Page**
- \*Label**: The Campground
- \*Developer Name**: The\_Campground
- Page Type**: App Page
- Template**: Main Column and Right Sidebar
- Description**: (empty)
- Actions**: No actions are selected.

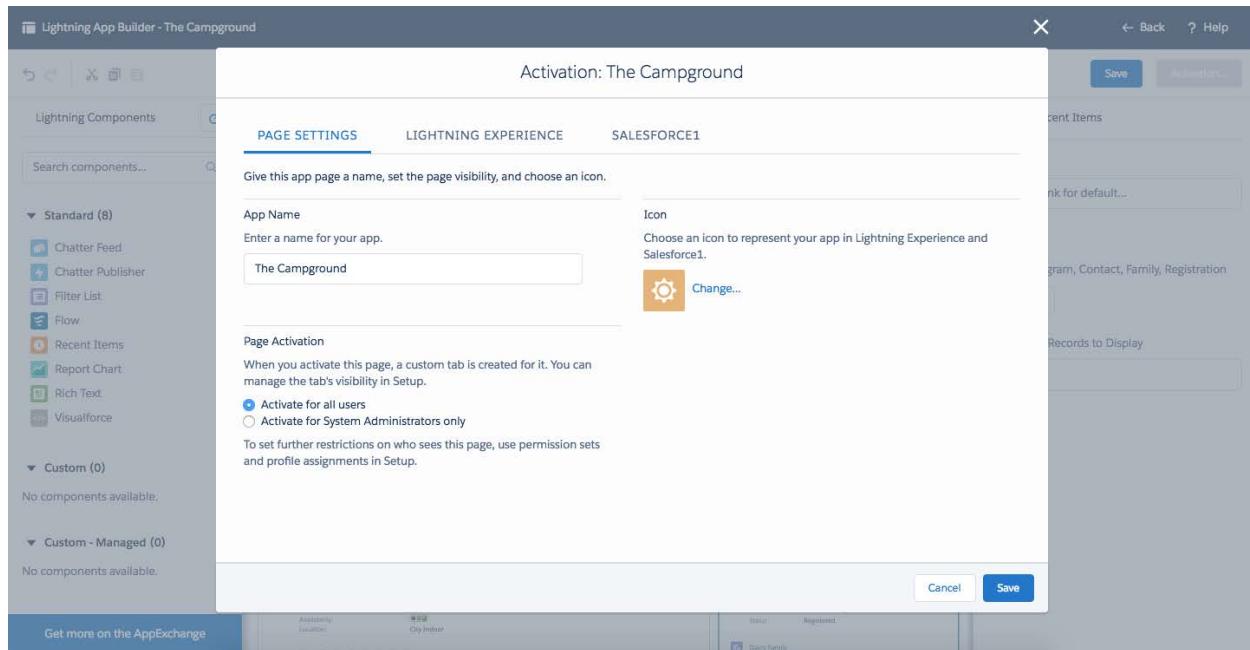
At the bottom left of the workspace, there's a blue button labeled 'Get more on the AppExchange'.

- 8.1. In the properties toolbar on the right, set the object to **Camp Program**
- 8.2. Set the filter to **Camps This Year**
- 8.3. Set the number of records to **10**
9. From the Lightning Component toolbox, drag the **Report Chart** component into the upper side column
  - 9.1. In the properties toolbar on the right, select report **Activity Planning by Camp Program**
  - 9.2. Select the checkbox for **Show Refresh Button**
10. From the Lightning Component toolbox, drag the **Recent Items** component into the lower side column
  - 10.1. In the properties toolbar on the right, click **Select**
  - 10.2. Deselect Asset object, and select Camp Program, Contact, Family, and Registration



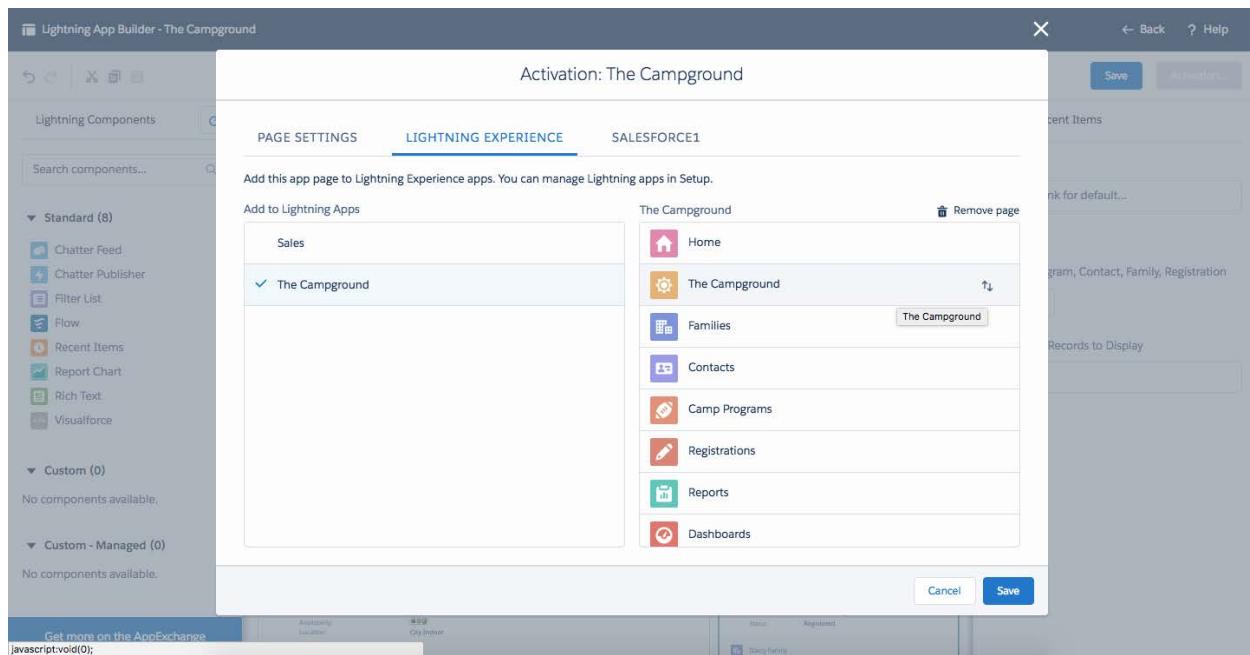
The screenshot shows the 'Lightning App Builder - The Campground' interface. A modal window titled 'Objects' is open, allowing the user to select objects to include in the app. The 'Selected' list contains 'Camp Program'. The 'Available' list includes 'Price Book', 'Product', 'Social Persona', 'Topic', and 'Asset'. The 'Label' field is set to 'Leave blank for default...'. The 'Number of Records to Display' is set to 3.

11. Click **Save**
12. Click **Activate**
13. Under Page Settings, change the icon to the Sun (



The screenshot shows the 'Activation: The Campground' page settings. The 'App Name' is 'The Campground' and the 'Icon' is a sun icon. The 'PAGE SETTINGS' tab is selected. The 'LIGHTNING EXPERIENCE' and 'SALESFORCE1' tabs are also visible.

14. Click the **Lightning Experience** tab
- 14.1. Select **The Campground** and click **Add page to app**

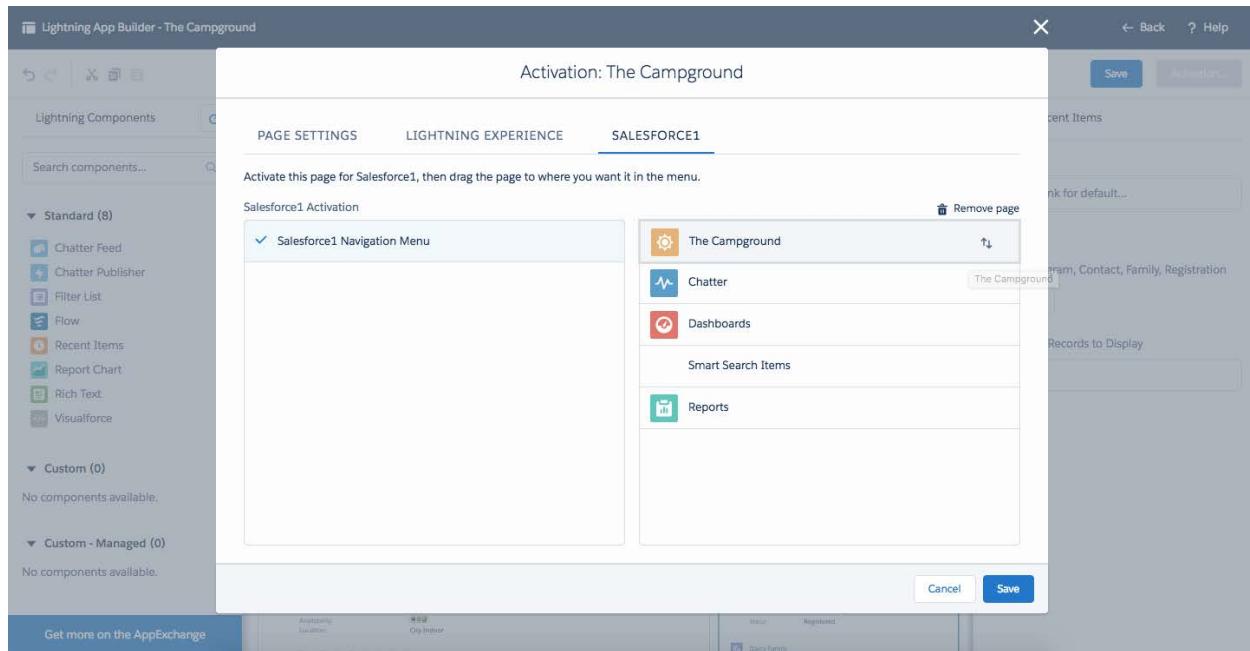


The screenshot shows the Lightning App Builder interface. The left sidebar lists standard components like Chatter Feed, Chatter Publisher, Filter List, Flow, Recent Items, Report Chart, Rich Text, and Visualforce. The main area is titled 'Activation: The Campground'. It has three tabs: PAGE SETTINGS, LIGHTNING EXPERIENCE (selected), and SALESFORCE1. Under 'Add to Lightning Apps', 'Sales' is selected. On the right, there's a list of pages under 'The Campground': Home, The Campground (which is checked and highlighted in orange), Families, Contacts, Camp Programs, Registrations, Reports, and Dashboards. A 'Remove page' button is next to 'The Campground'. At the bottom right are 'Cancel' and 'Save' buttons.

**15. Click the **Salesforce1** tab**

**15.1. Click **Add page to app****

**15.2. Rearrange **The Campground** to the top of the list**



The screenshot shows the Lightning App Builder interface with the 'SALESFORCE1' tab selected. The main area is titled 'Activation: The Campground'. It has three tabs: PAGE SETTINGS, LIGHTNING EXPERIENCE, and SALESFORCE1 (selected). Under 'Activate this page for Salesforce1, then drag the page to where you want it in the menu.', 'Salesforce1 Navigation Menu' is selected. On the right, there's a list of pages under 'The Campground': The Campground (highlighted in orange and moved to the top), Chatter, Dashboards, Smart Search Items, and Reports. A 'Remove page' button is next to 'The Campground'. At the bottom right are 'Cancel' and 'Save' buttons.

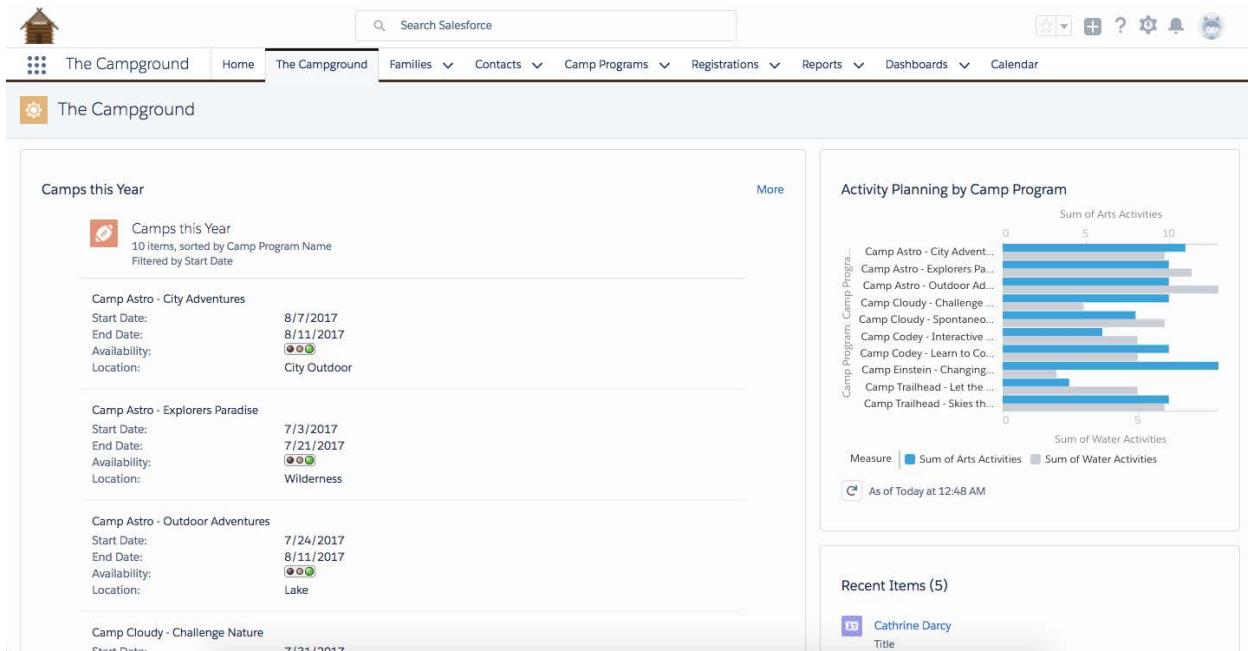
**16. Click **Save****

**17. Click **Back****

**18. Click the App Launcher logo (⋮) in the top left of the page, and select **The Campground App****

**19. Click on the **The Campground** tab at the top of the page**

**20. Review your custom app page!**



The screenshot shows a custom Salesforce app page for 'The Campground'. The top navigation bar includes links for 'The Campground', 'Home', 'Families', 'Contacts', 'Camp Programs', 'Registrations', 'Reports', 'Dashboards', and 'Calendar'. The main content area has a section titled 'Camps this Year' listing four camps with their details (Start Date, End Date, Availability, Location). To the right is a chart titled 'Activity Planning by Camp Program' comparing 'Sum of Arts Activities' and 'Sum of Water Activities' across various camp programs.

Camp Program	Sum of Arts Activities	Sum of Water Activities
Camp Astro - City Adventures	~10	~10
Camp Astro - Explorers Paradise	~8	~10
Camp Astro - Outdoor Adventures	~8	~10
Camp Cloudy - Challenge Nature	~5	~5
Camp Codey - Interactive Fun	~5	~5
Camp Einstein - Changing Times	~8	~5
Camp Trailhead - Let the Games Begin	~5	~5
Camp Trailhead - Skies the Limit	~8	~5

You have now created a specific app page for your camp management application. Similar to the home tab, this is a one-stop shop to understand everything camp management!

## Wrap-up: Additional Resources

Well your adventure is over for today, but it's not finished. As a Salesforce administrator, this is the start of a rewarding journey in your career. Here are some resources that you should check out:

- Certifications** – There are a number of certifications that you can get to showcase all your Salesforce knowledge. Check out <http://certification.salesforce.com/administratoroverview> for the administrator certifications, as well as the App Builder and Consultant certifications
- Admin Resources** – Check out the Salesforce Admin Community, where you can work with and bounce ideas off of fellow admins (<https://admin.salesforce.com/>)
- Developer Resources** – Want to amp your Salesforce game into the programmatic? Check out <https://developer.salesforce.com/> to find a wealth of resources to get you well on your way
- Circles of Success** – Have questions about how best to accomplish a use case, check out a circle of success to chat with a Salesforce customer success resource (<https://success.salesforce.com/featuredGroupDetail?id=a1z3A000002vaXbQAI>)
- Trailhead** – We saved the best for last... If you enjoyed this hands-on workshop, take your Salesforce chops to Trailhead (<https://trailhead.salesforce.com/>) to do hands-on exercises across a number of modules and content areas

On behalf of everyone at Salesforce, thank you!