Milestone 1- Create Salesforce Org

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:
https://youtu.be/r9EX3lGde5k

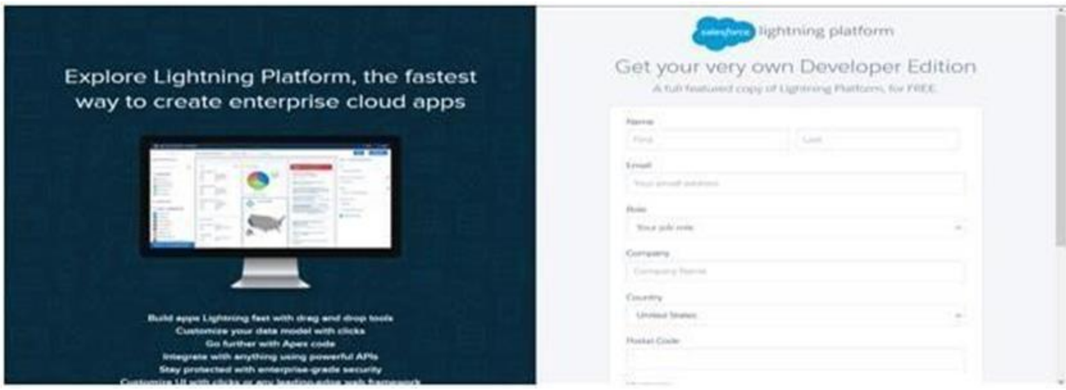
Creating Developer Org

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign-up form, enter the following details:
1. First name & Last name
2. Email
3. Role: Developer
4. Company: College Name
5. County: India
6. Postal Code: pin code
7. Username: should be a combination of your name and company

   This need not be an actual email id, you can give anything in the format: username@organization.com

Click on sign up after filling these.



Sign up to get your very own Developer Edition for free to create ente..

Sign up to get your very own Developer Edition for free to create enterprise cloud apps...

https://developer.salesforce.com/signup

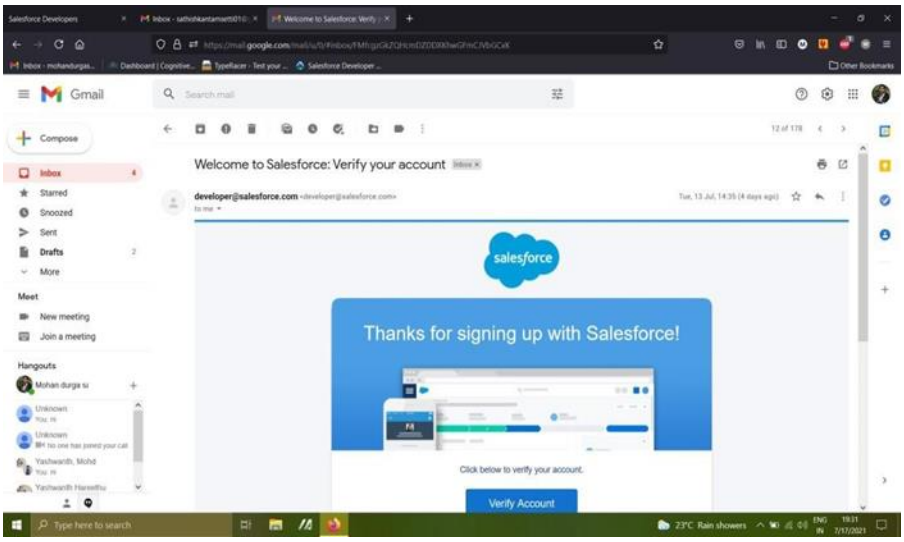
Sign up to get your very own Developer Edition for free to create ente..

Sign up to get your very own Developer Edition for free to create enterprise cloud apps...

https://developer.salesforce.com/signup

Account Activation

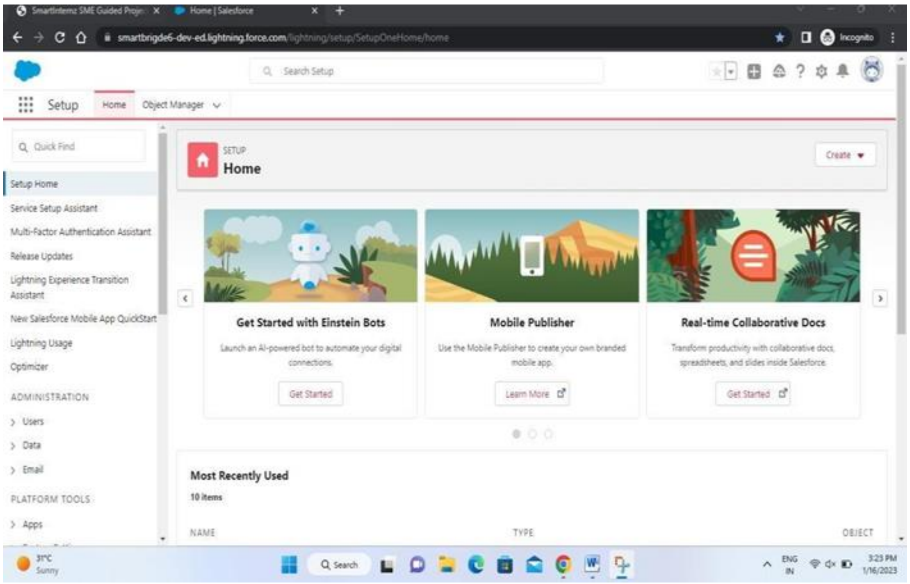
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



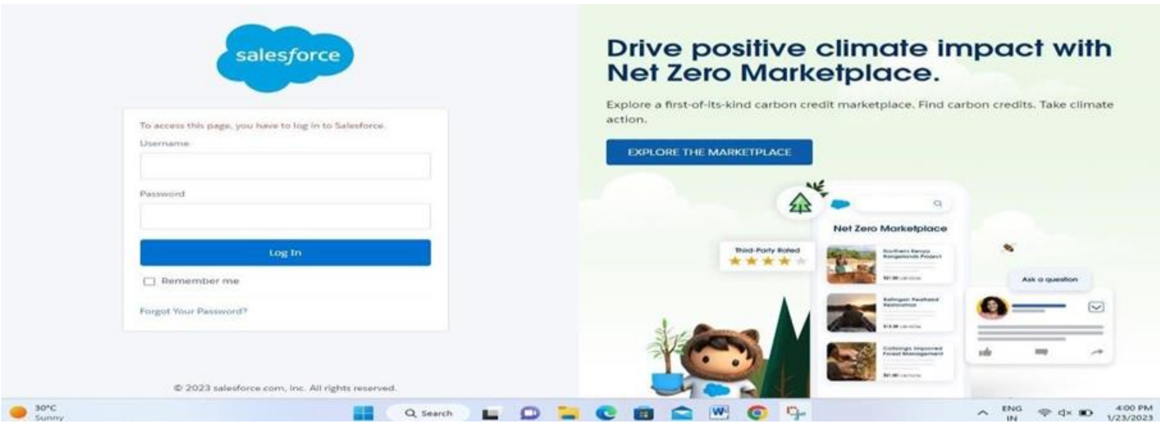
Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.

3. After login this is the home page which you will see.



Salesforce Login
htttps://login.salesforce.com



Salesforce Customer Secure Login Page. Login to your Salesforce Custom..

Salesforce Customer Secure Login Page. Login to your Salesforce Customer Account...

https://login.salesforce.com/

Creation Of Department Object For Travel Approval App

For this Travel Approval we need to create 5 objects **Department, Employee Detail, Expense, Expense Items,** and **Travel Approval**. The below steps will assist you in creating those objects.

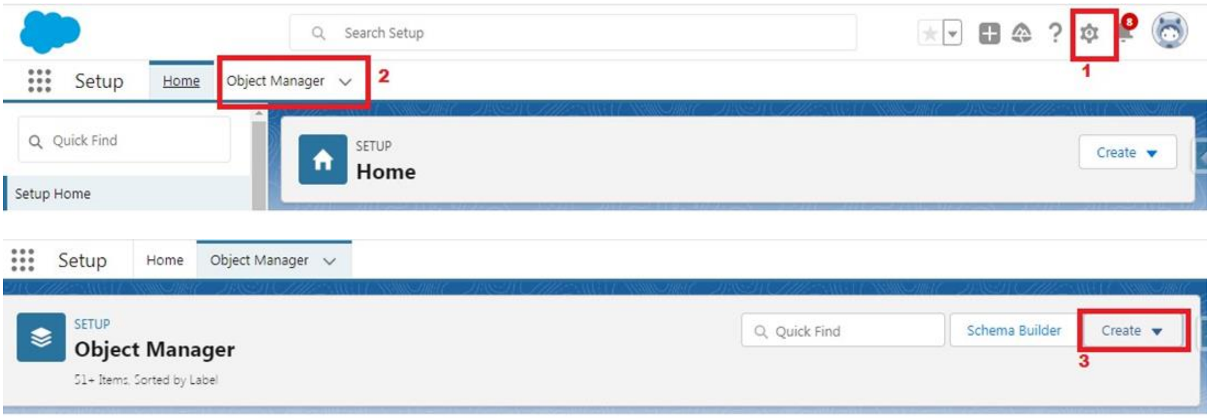
Create Department Object:

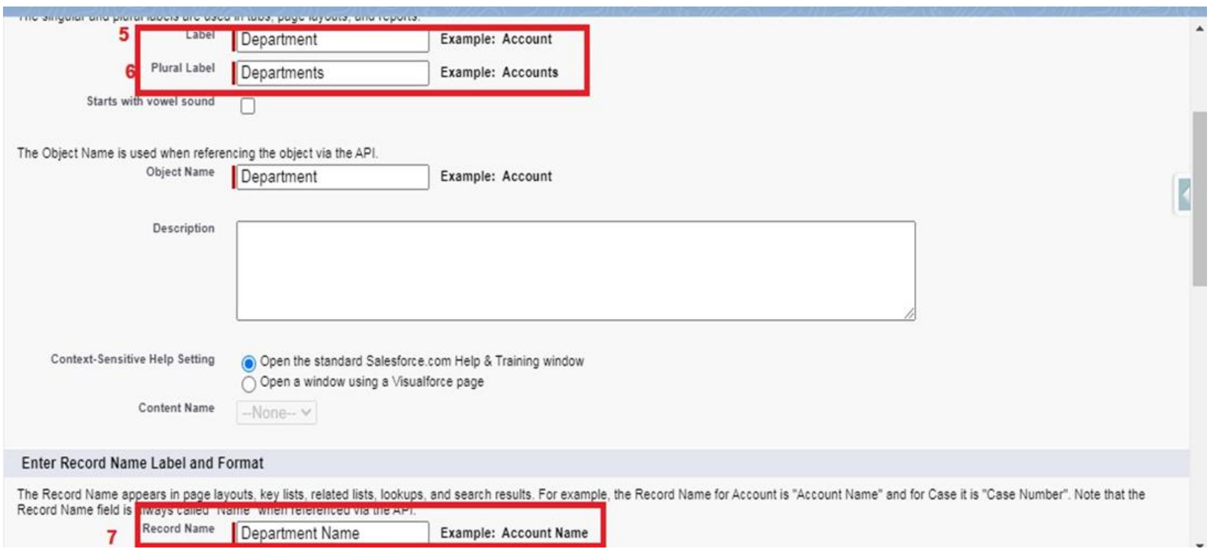
1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Department
6. Plural Label: *Departments*
7. Record Name: *Department Name*
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

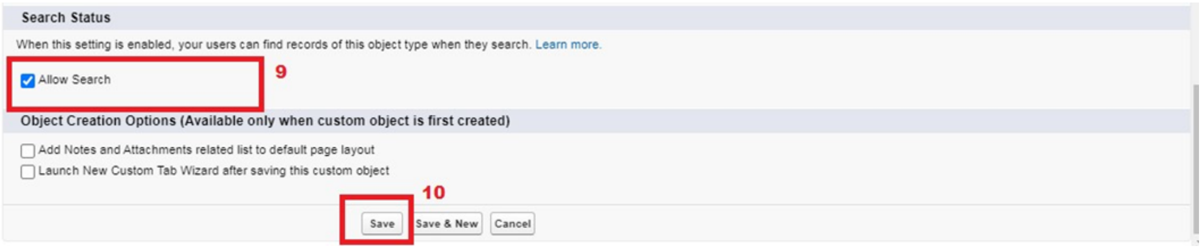
In the same way create 4 more objects **Employee Detail, Expense, Expense Items**, and **Travel Approval**

Note –

1. While making Expense Object select data type "Auto Number" in "Enter Record Name Label and Format" section.
2. While making Employee Detail Object put "Employee Name" in "Enter Record Name Label and Format" section.



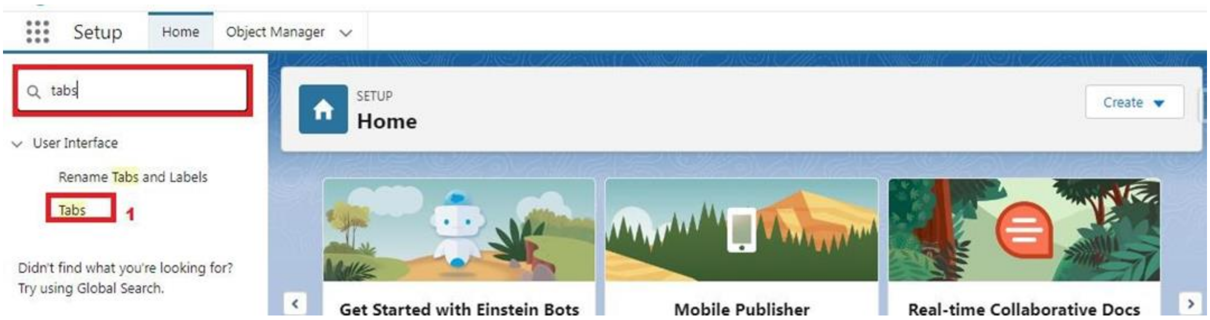


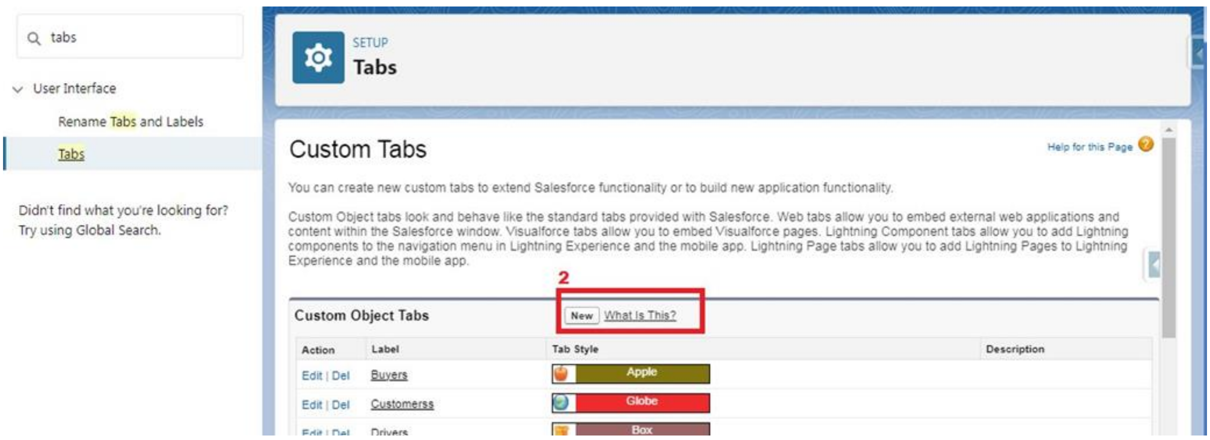


Custom Tab Creation

Now create a custom tab. Click the Home tab.

1.	Enter Tabs in Quick Find and select Tabs.
2.	Under Custom Object Tabs, click New.
3.	For Object, select Department.
4.	For Tab Style, select any icon.
5.	Leave all defaults as is. Click Next, Next, and Save
6.	In the same way create Tabs for all Custom Objects - Employee Detail, Expense, Expense Items, Travel Approval.

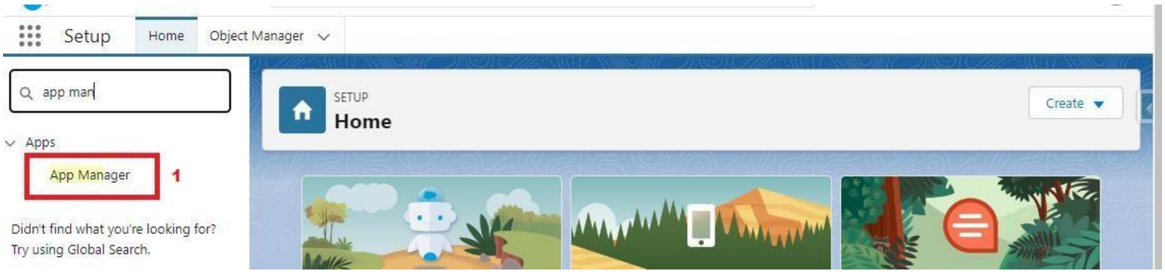


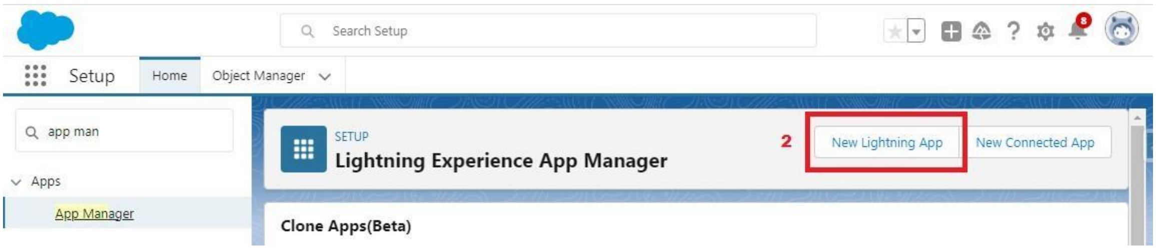


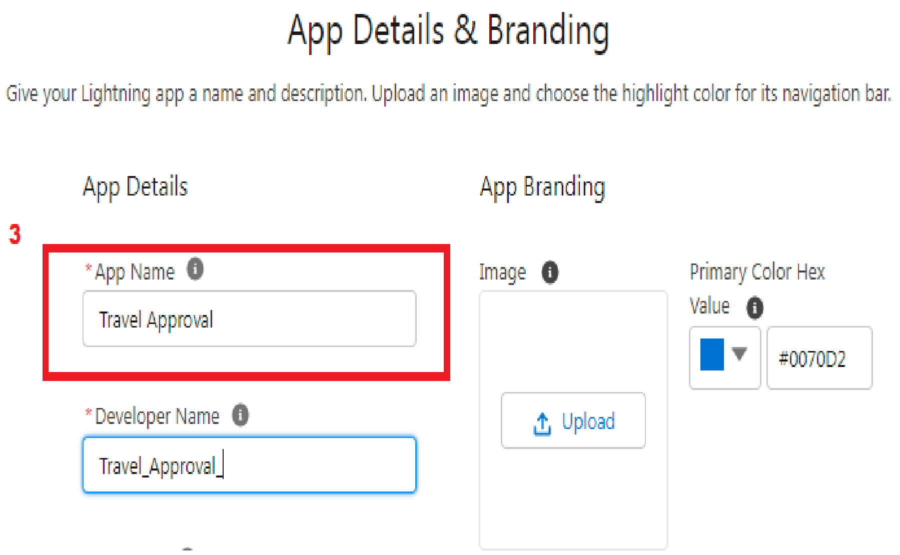
Create Travel Approval App

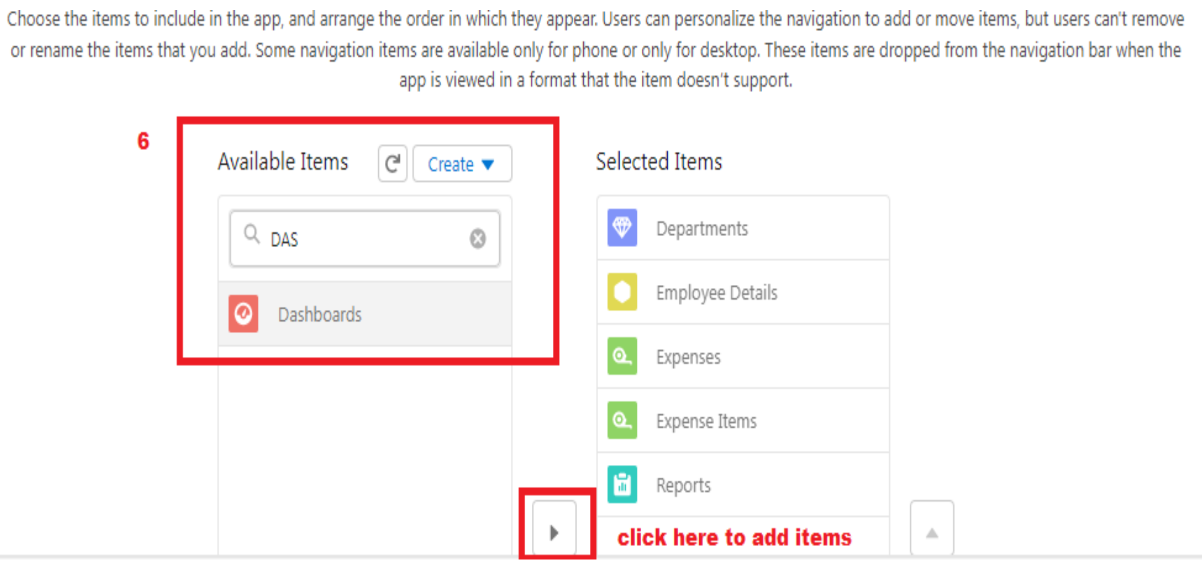
Create the Travel Approval app

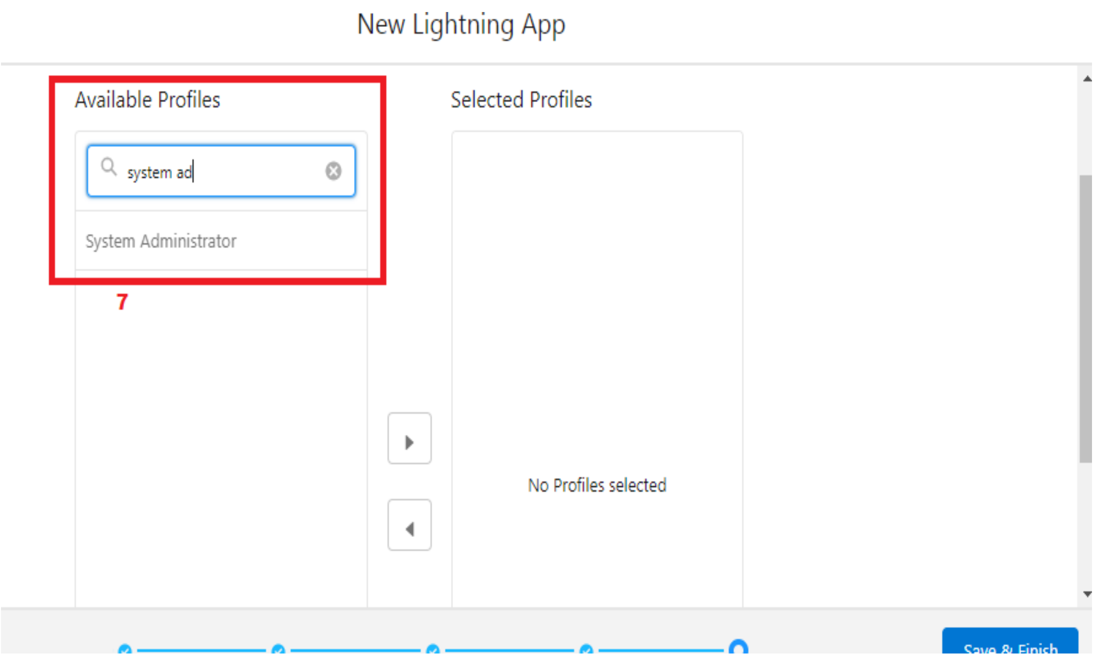
1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter **Travel Approval** as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select **Department, Employee Detail, Expense, Expense Items, Travel Approval, Reports, and Dashboards** and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles.Click Save & Finish.






App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
App Branding
3
*App Name
Travel Approval
*Developer Name
Travel_Approval_
Image
Upload
Primary Color Hex Value
#0070D2


Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
6
Available Items
Create
DAS
Dashboards
Selected Items
Departments
Employee Details
Expenses
Expense Items
Reports
click here to add items

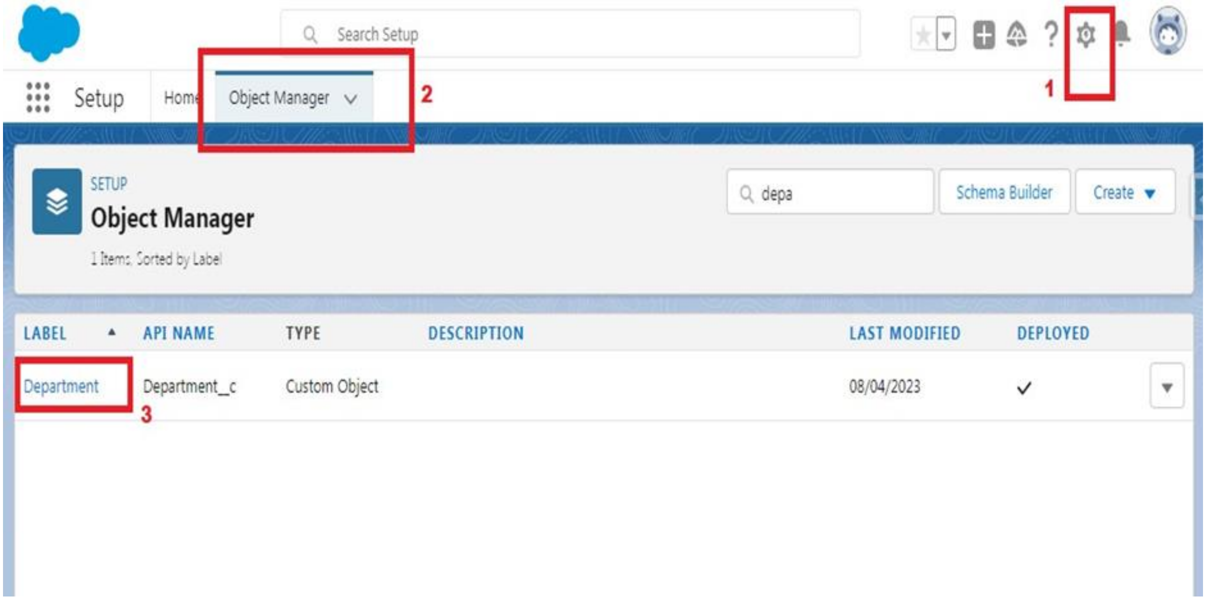


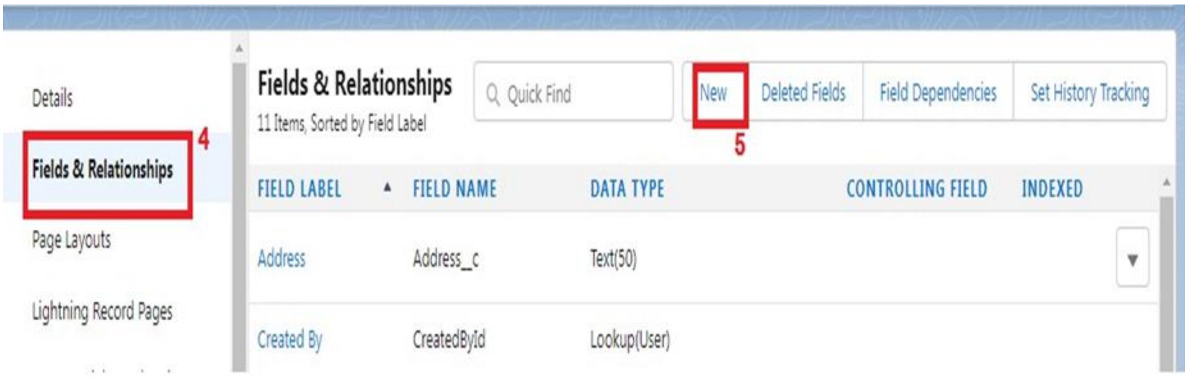
To verify your changes, click the App Launcher, type **Travel Approval** and select the
Travel Approval app.

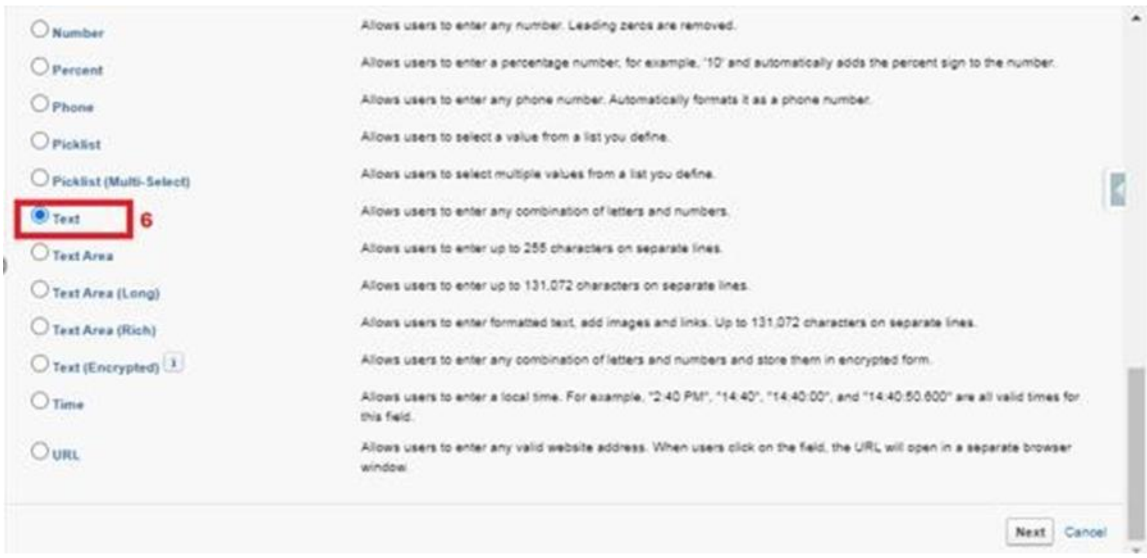
Note:
App Launcher-Displays available apps.
App Name-Displays the current selected app.

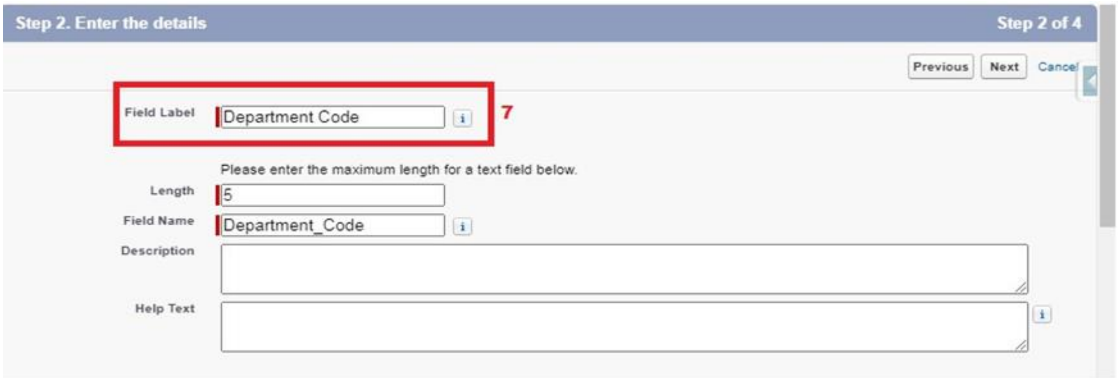
Creation Of Fields For The Department Object:

1.Click the gear icon and select Setup. This launches Setup in a new tab.
2.Click the Object Manager tab next to Home.
3.Select Department
4.Select Fields & Relationships from the left navigation
5.Click New
6.Select the Text as the Data Type, click Next.
7.For Field Label, enter Department Code and enter 5 in Length.
8.Click Next, Next, then Save & New.
9.Follow above steps and create two more Text type field - District & State.
10.Also, Provide Length 40 for both District and State field.
11.Create URL type field & give “School website” as the field label.


Search Setup
Setup
Home
Object Manager
1
2
SETUP
Object Manager
1 Items, Sorted by Label
depa
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Department
Department_c
Custom Object
08/04/2023
3


Details
Fields & Relationships
4
Page Layouts
Lightning Record Pages
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
5
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Address
Address_c
Text(50)
Created By
CreatedById
Lookup(User)


Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
6
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
Next
Cancel



Now let's create the other fields and we must choose the data types of the fields carefully. Let's have a look at it.

These are fields and their data types we need to create and make one by one –

NOTE- See activity 2, 3, 4 below to create a lookup field, Roll-up summary field & Picklist field

Object Name	Field Name	Data Type
1. Employee Detail-	Date of Birth	Date
	Gender	Picklist (Male, Female)
	Department	Lookup (Department)(See activity 2 to create lookup)
	Employee Id	Text (Length - 12)
2. Expense-	Employee	Lookup (Employee Detail)
	Total Item	Rollup summary (Expense Item)
3. Expense Item -	Expense	Master Detail (Expense)
	Expense Type	Pick List (Values are- Transport, Hotel, Meal, Others)
	Amount	Currency
4. Travel Approval-	Employee Name	Lookup (Employee Detail)
	Department	Lookup (Department)
	Destination state	Text (Length – 40)
	Purpose of trip	Text (Length – 256)
	Trip start date	Date
	Trip End date	Date
	Status	Picklist (Values are- Approved, Rejected)

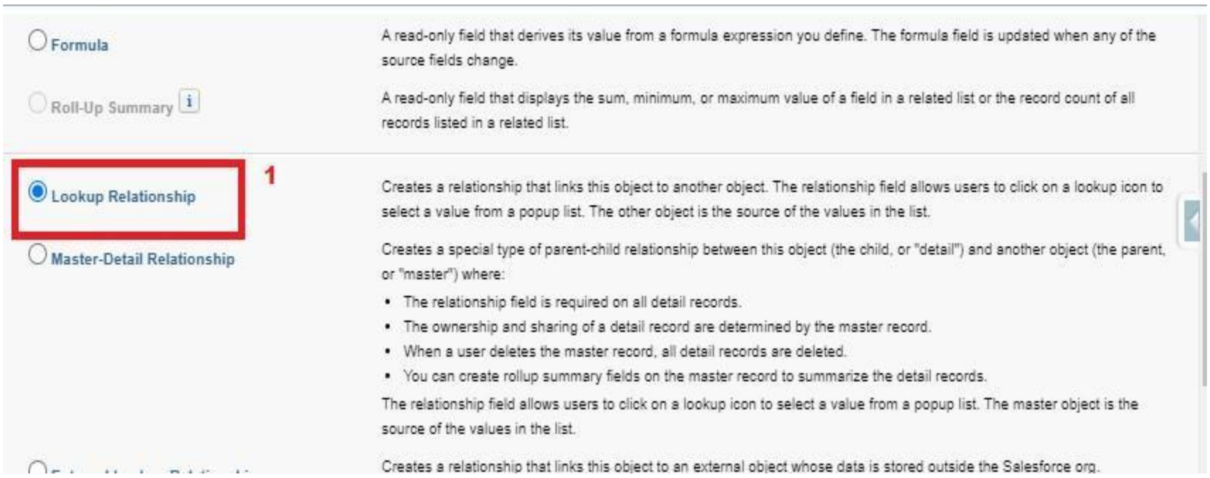
NOTE- Make Trip Start Date and Trip End Date field required when making these field

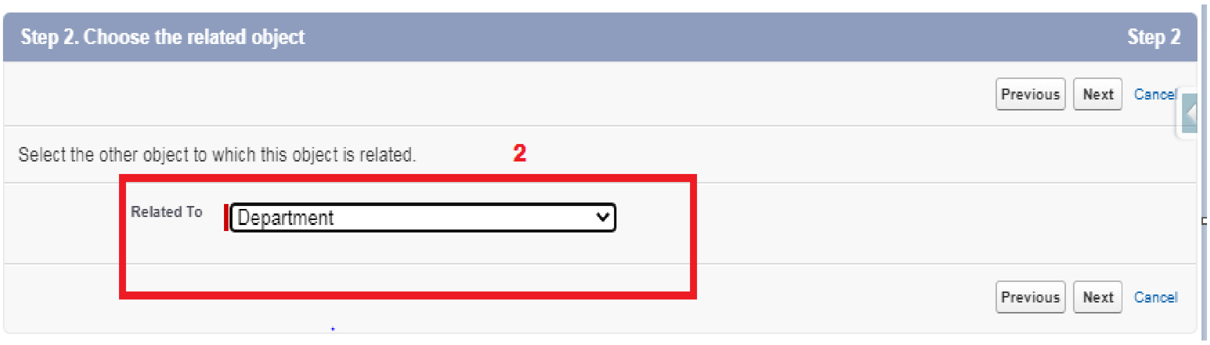
Lookup Relationship With Department

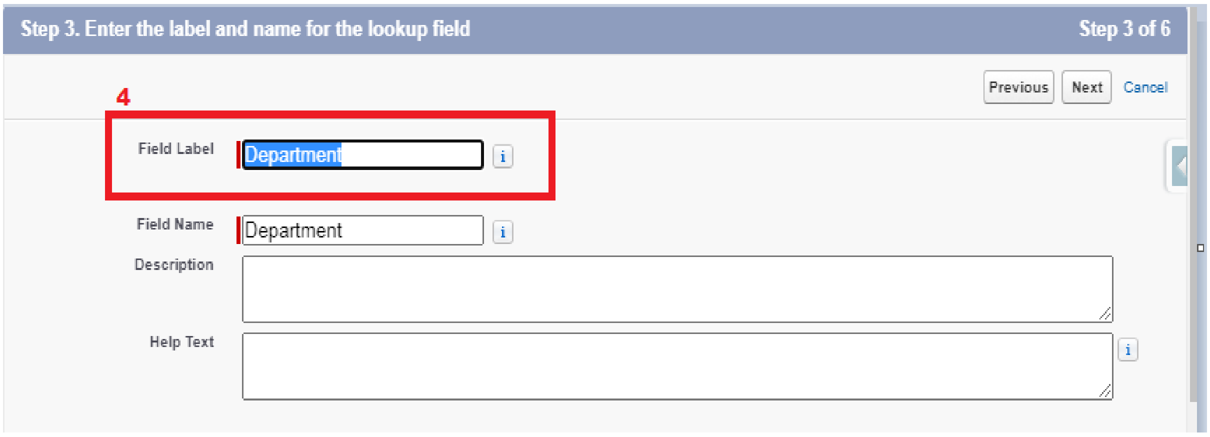
Let's create a Lookup relationship with Department object on Employee Detail object Follow steps 1 to 5 of field creation then follow below steps.
Select look up Relationship as the Data Type and click Next.

For Related to, enter Department.
Click Next.

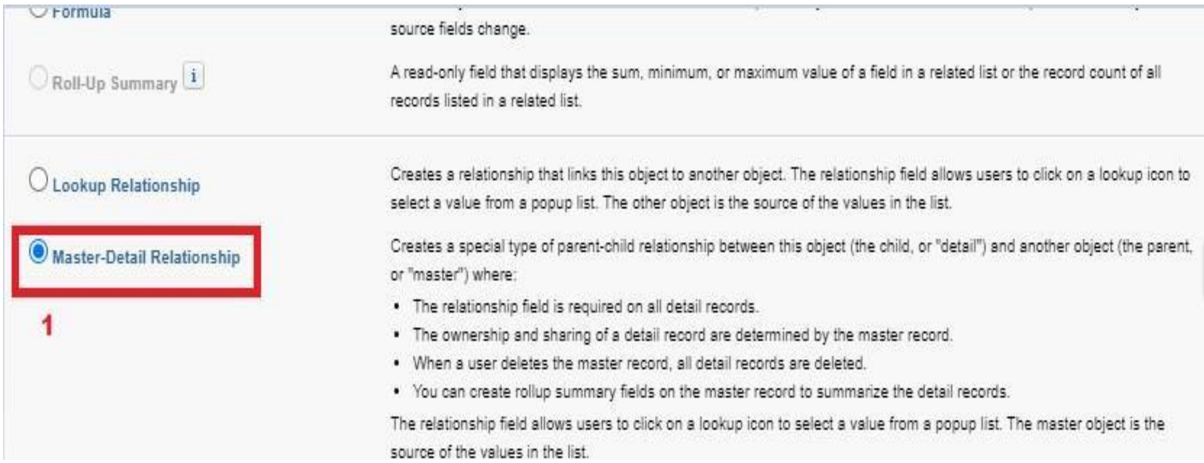
For Field Label, enter Department.
Click Next, Next, Next and Save.

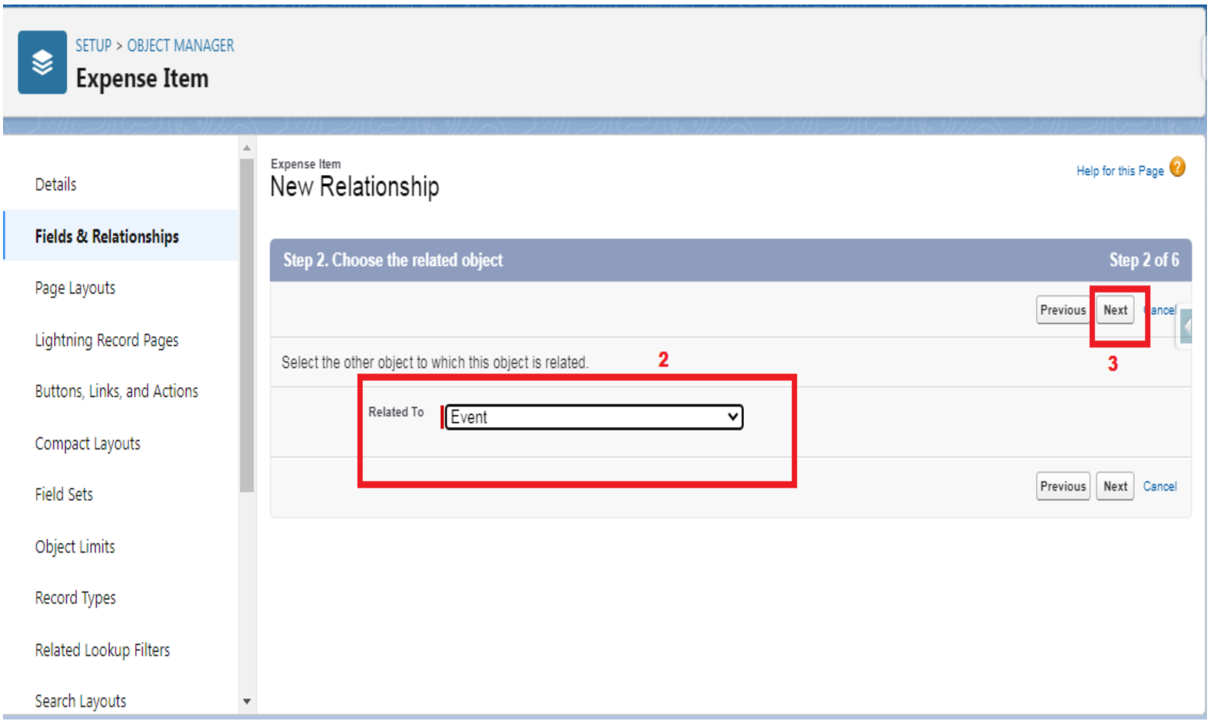


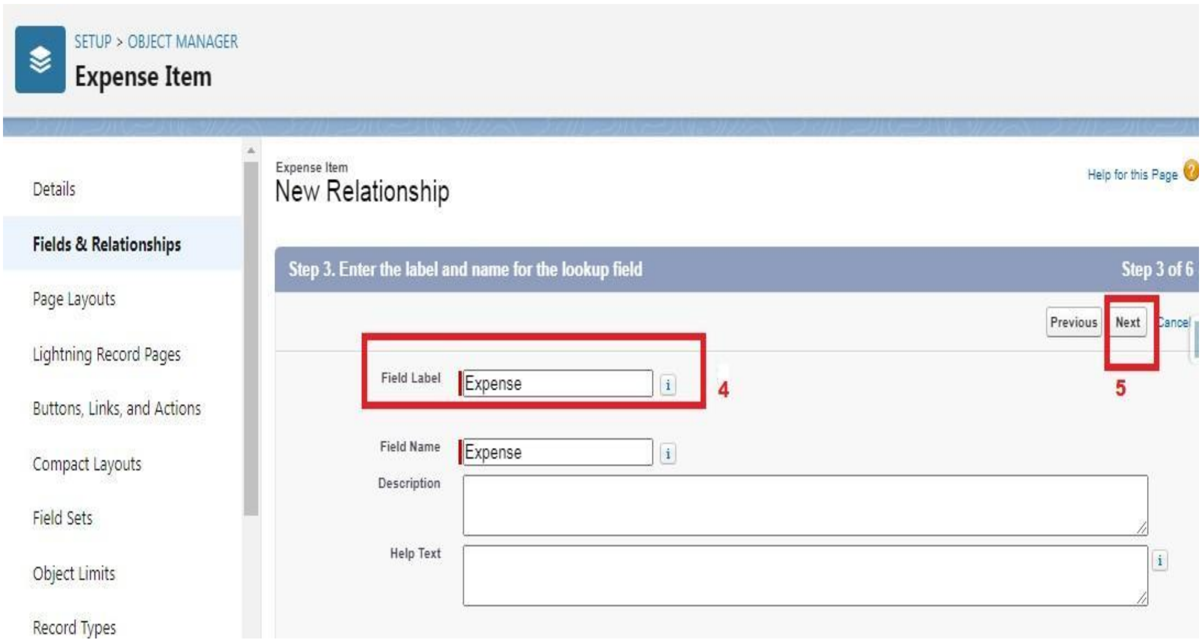




Let's create a master-detail relationship on Expense Item object Follow steps 1 to 5 of field creation then follow below steps.
Select Master-Detail Relationship as the Data Type and click Next.
For Related to, enter Expense.
Click Next.
For Field Label, enter Expense.
Click Next, Next, Next and Save.







Roll Up Summary Fields On Expense Object

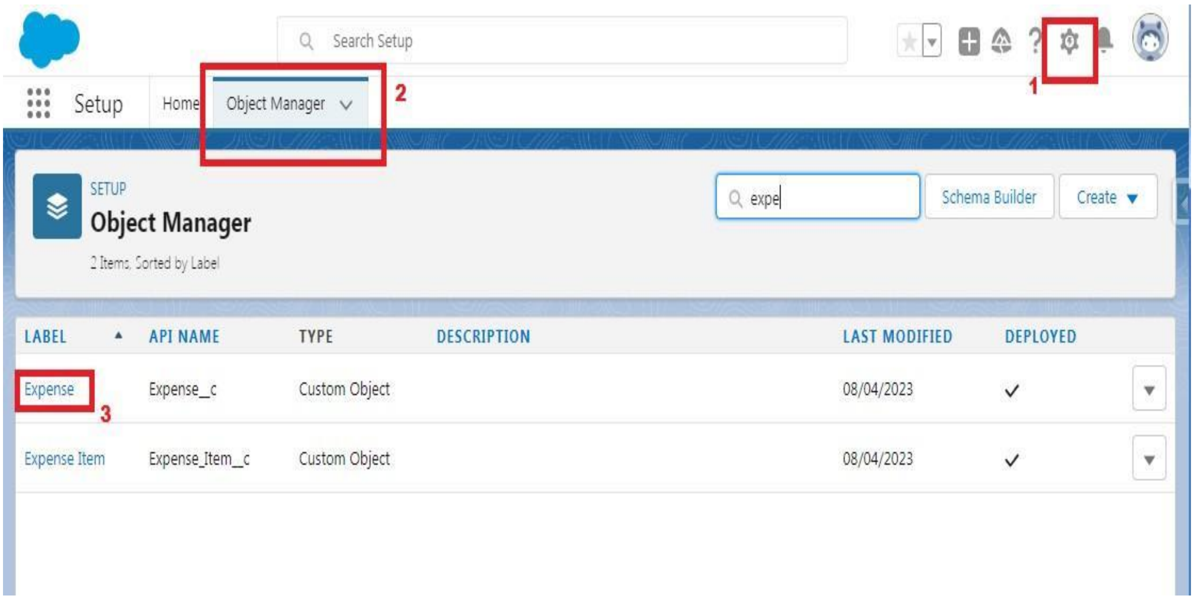
Let's create Roll-up summary fields on Expense Object to calculate the expense

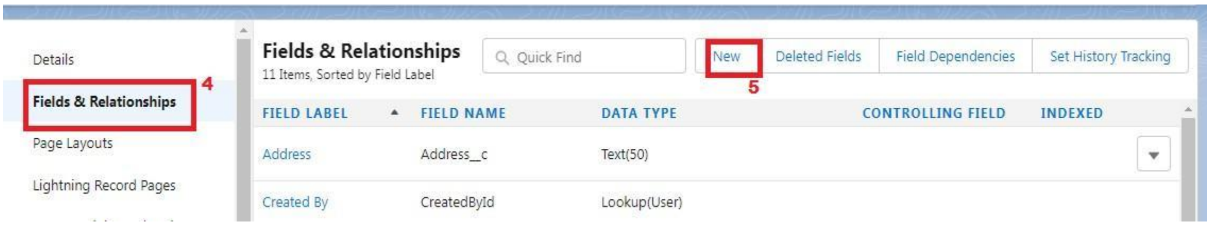
1. Click the gear icon Select Setup, This launches Setup in a new tab.
2. click Object Manager
3. Select Expense.
4. Click Fields & Relationships
5. Click New.

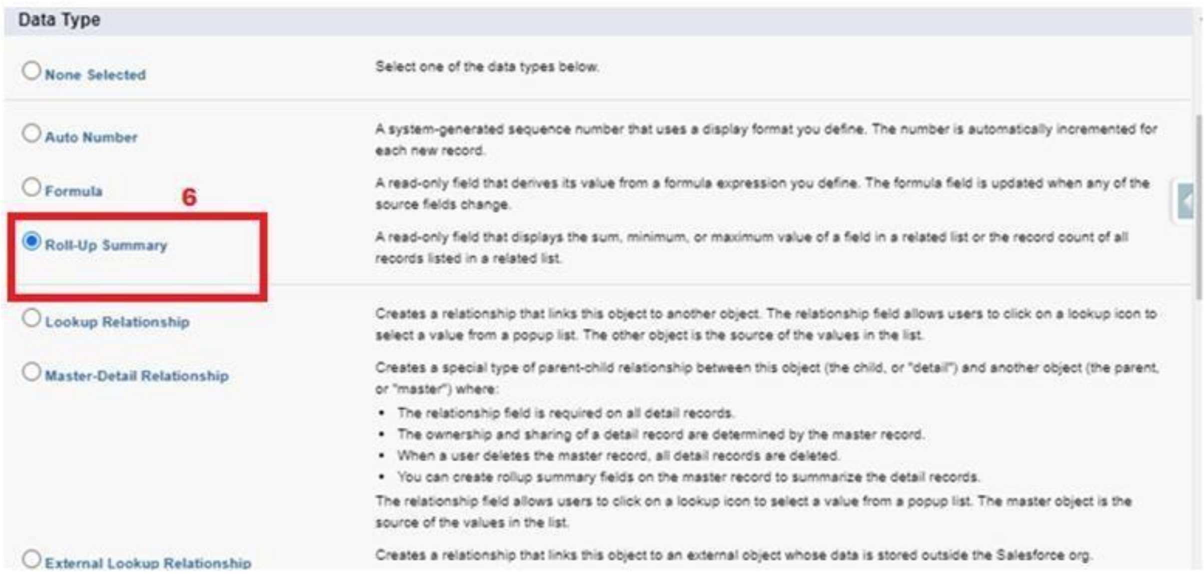
Select the Roll-up summary field as the data type
Enter the field label as Total Expense

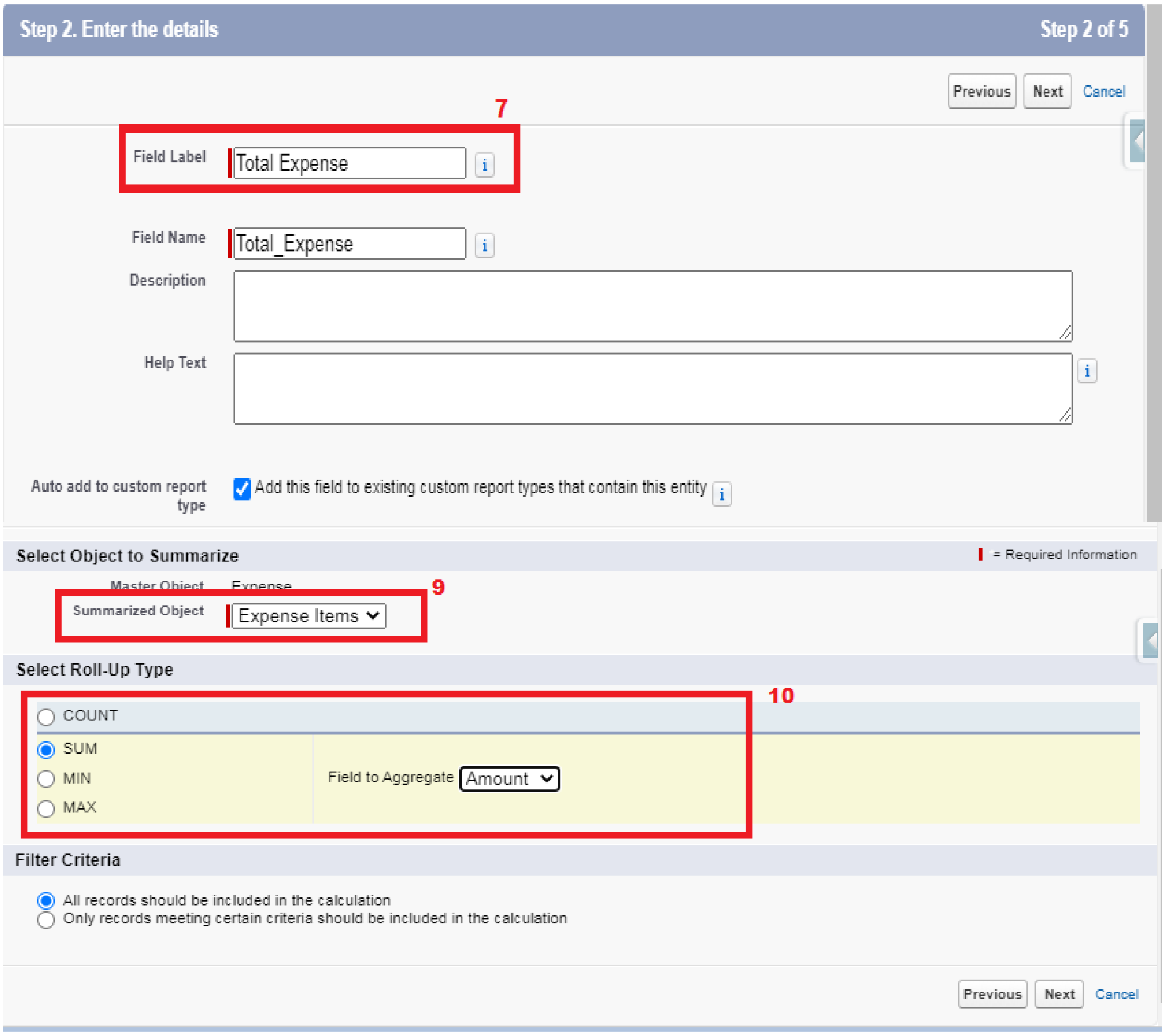
Click Next
Then select the master object summarized as Expense items

Select Sum as roll-up and Field to aggregate Amount then click Next, Next and save.









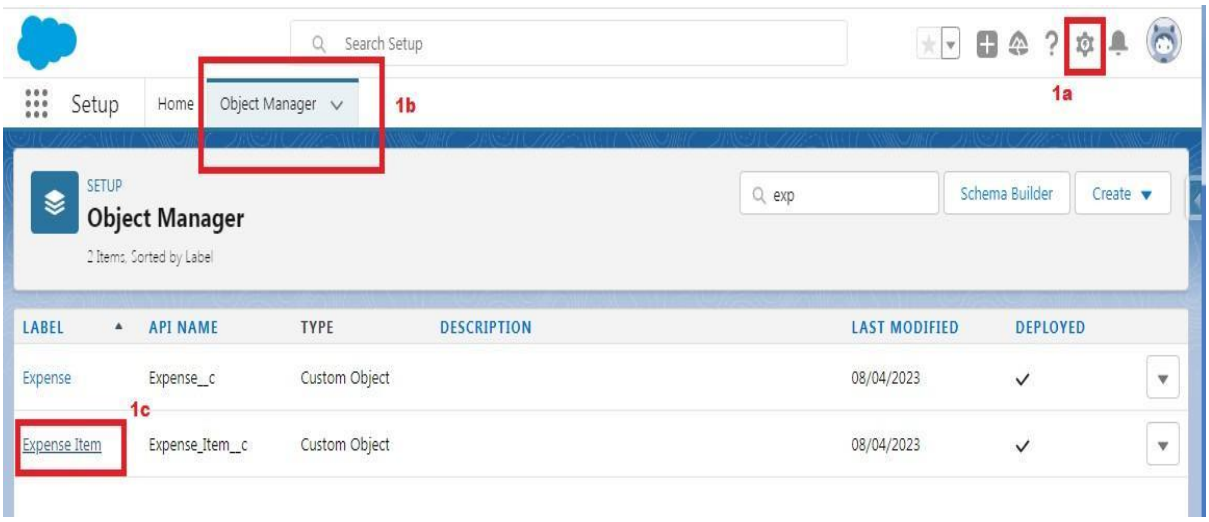
Pick List Field

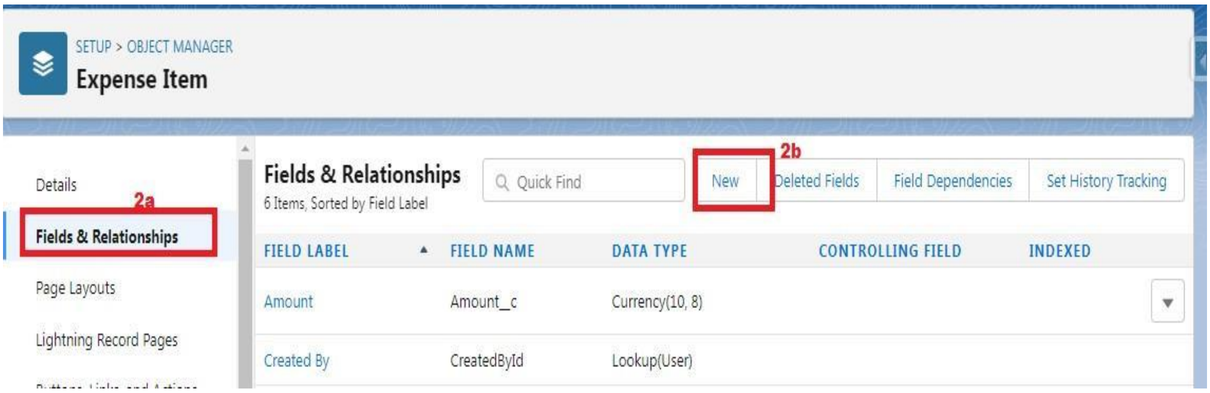
Let’s create a Pick-List field:

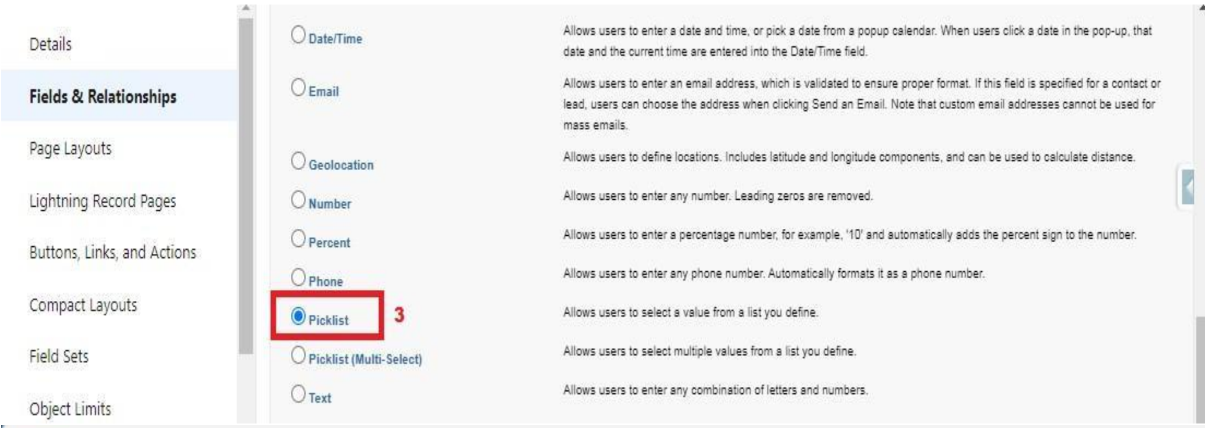
1) From Setup, click Object Manager and select Expense Item.
2)Click Fields & Relationships, then New.
3)Select Picklist as the Data Type and click Next.
4)For Field Label enter Expense Type
5)Select Enter values, with each value separated by a new line, and enter these values:

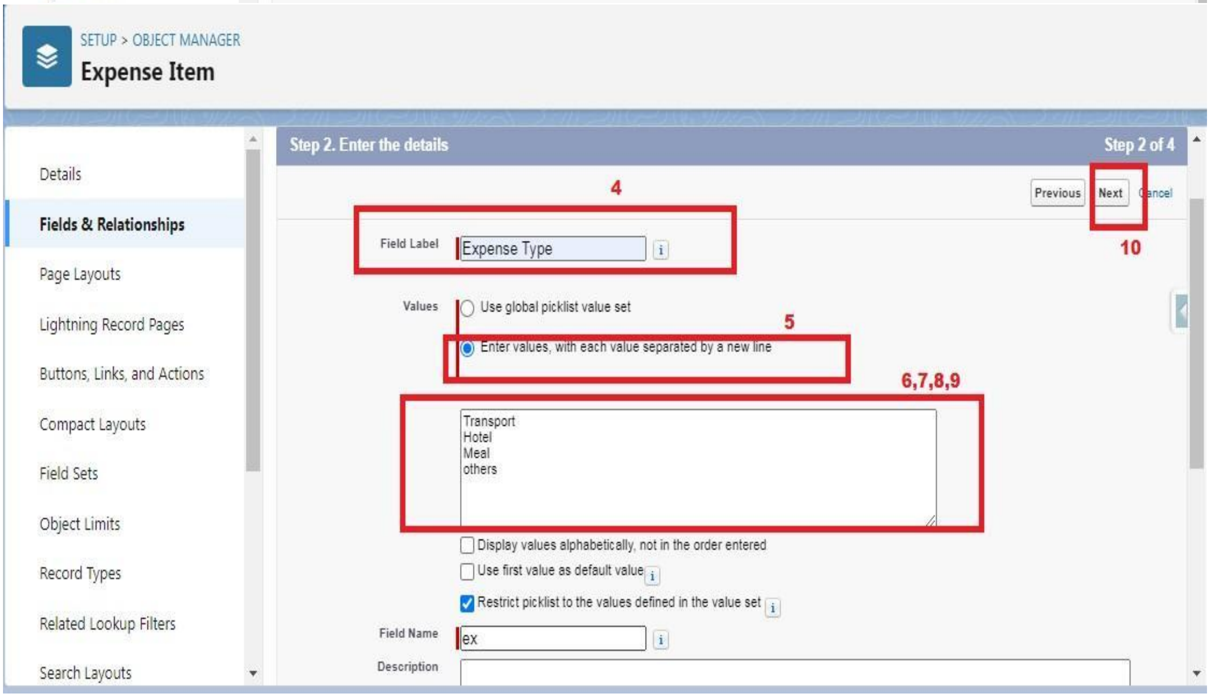
- Transport
- Hotel
- Meal
- others

Click Next, Next, then Save & New





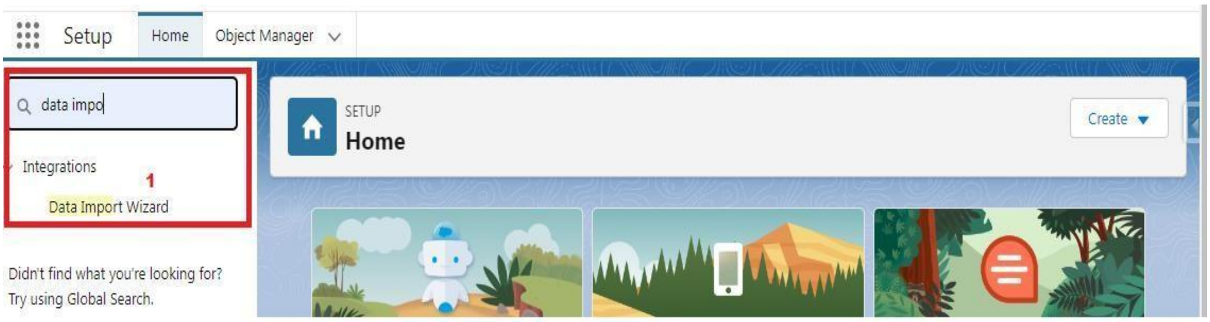


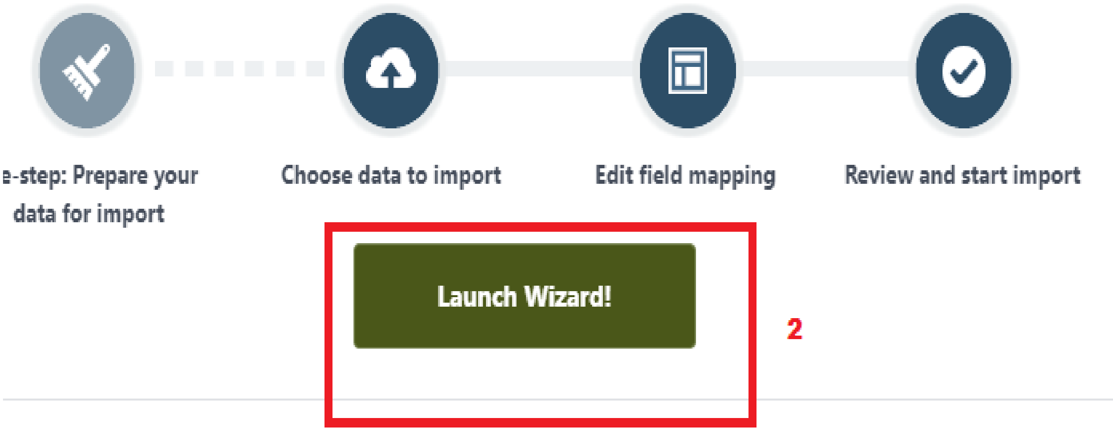


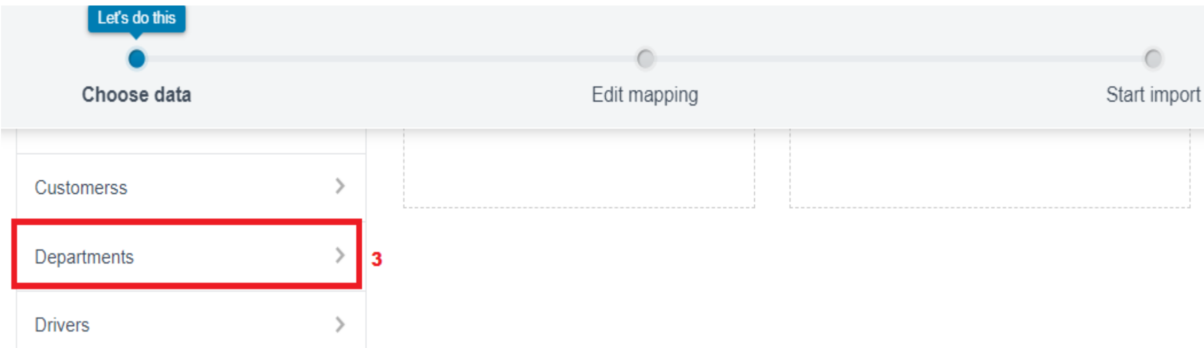
Data Import

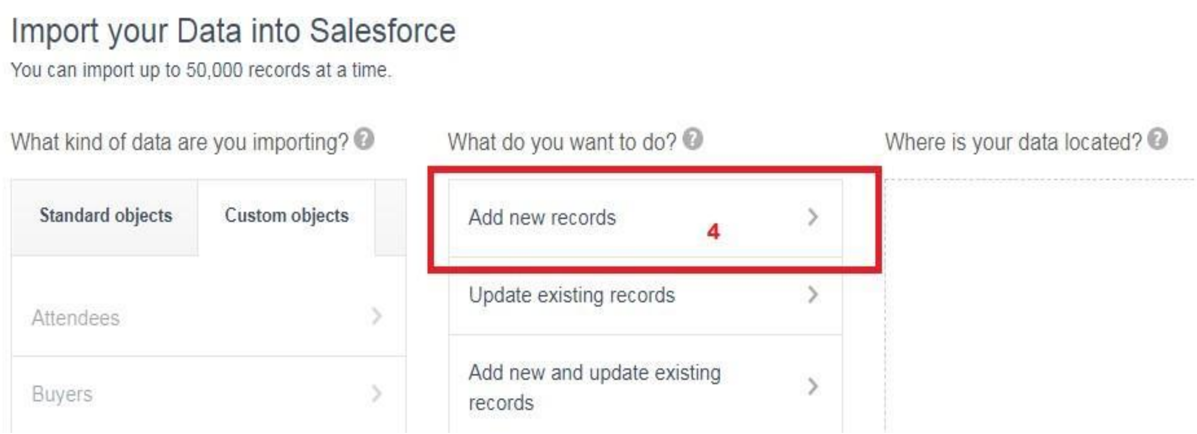
From Setup, click the Home tab.
1)In the Quick Find box, enter Data Import and select Data Import Wizard.
2)Click Launch Wizard!
3)Click the Custom Objects tab and select the Departments object.
4)Select Add new records.
5)Click CSV and choose file Department_CSV which we made earlier. Click Next.
6)Since the field names in the CSV file (CSV Header) are the same as the field names in your object (Mapped Salesforce Object), the fields are automatically mapped. Click Next.

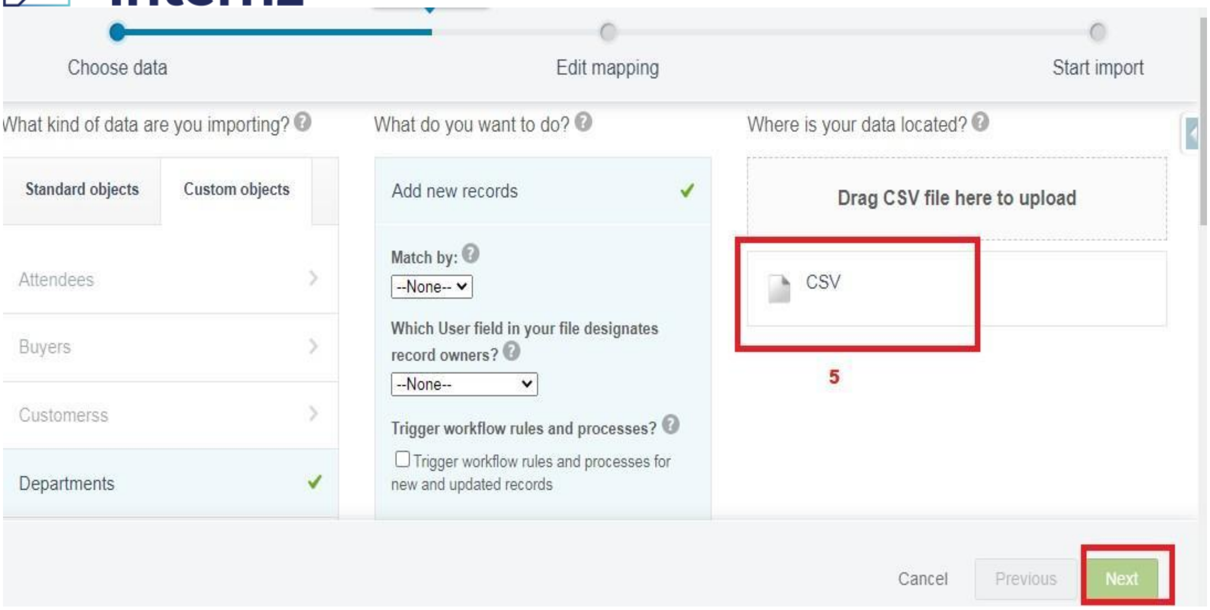
The next screen gives you a summary of your data import. Click Start Import.
Click OK on the popup.

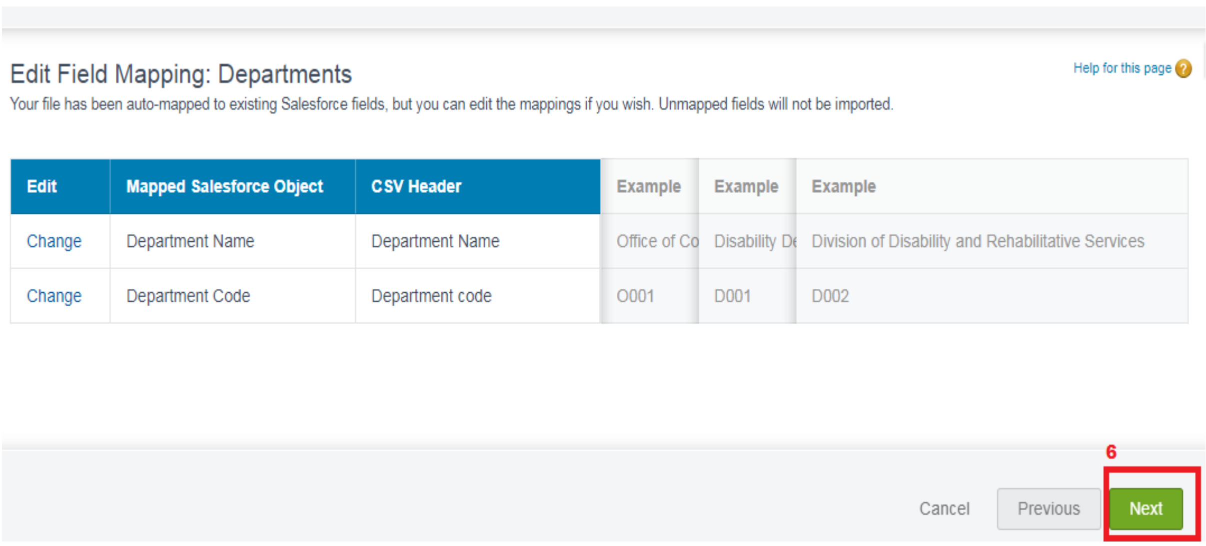

Setup
Home
Object Manager
data impo
Integrations
1
Data Import Wizard
Didn't find what you're looking for?
Try using Global Search.
SETUP
Home
Create

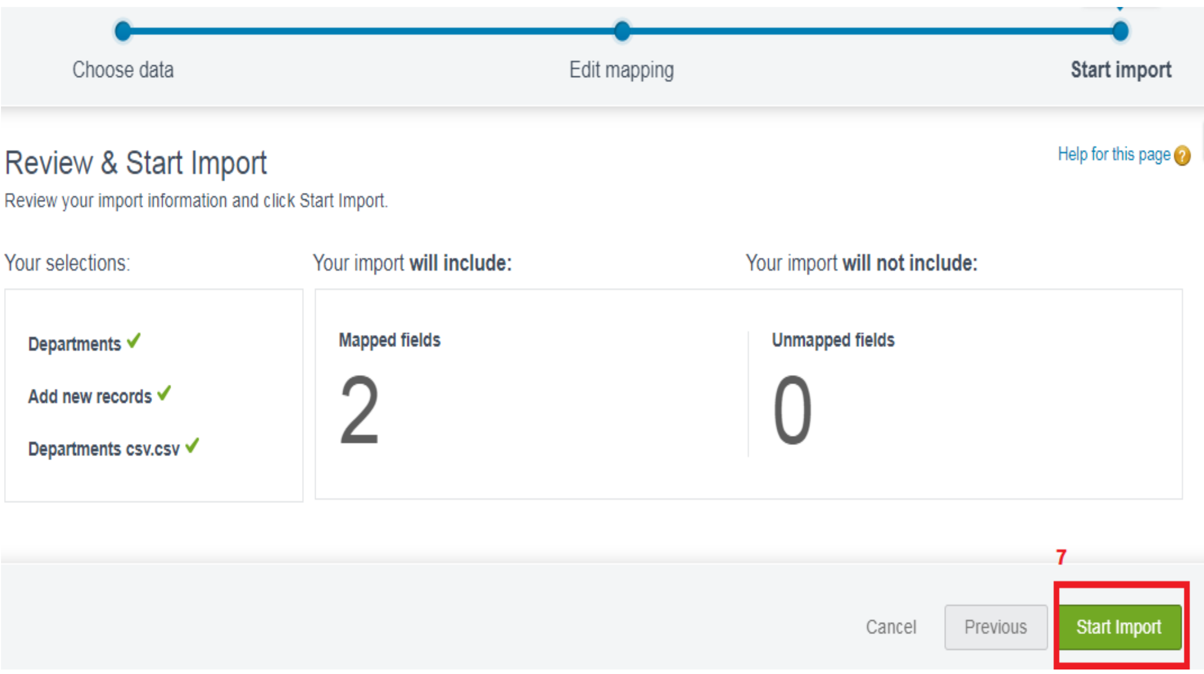

e-step: Prepare your data for import
Choose data to import
Edit field mapping
Review and start import
Launch Wizard!
2

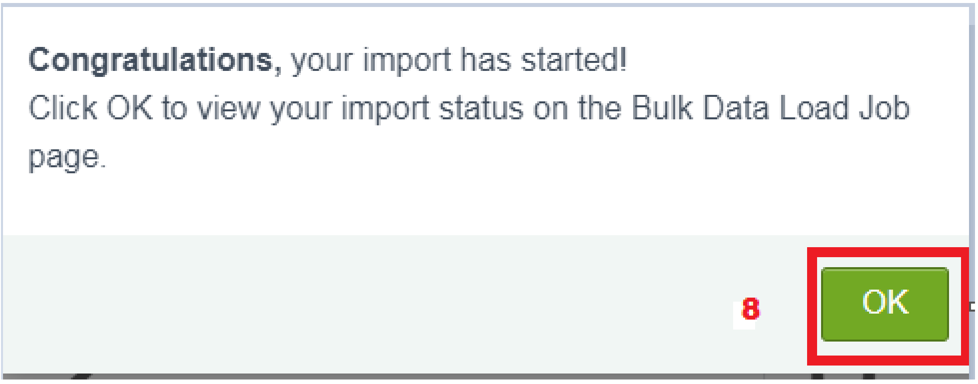

Let's do this
Choose data
Edit mapping
Start import
Customerss
Departments
3
Drivers


Import your Data into Salesforce
You can import up to 50,000 records at a time.
What kind of data are you importing?
What do you want to do?
Where is your data located?
Standard objects
Custom objects
Add new records
4
Attendees
Update existing records
Buyers
Add new and update existing records


Choose data
Edit mapping
Start import
What kind of data are you importing?
What do you want to do?
Where is your data located?
Standard objects
Custom objects
Add new records
Drag CSV file here to upload
Match by:
--None--
CSV
Attendees
Which User field in your file designates record owners?
5
Buyers
--None--
Customerss
Trigger workflow rules and processes?
Departments
Trigger workflow rules and processes for new and updated records
Cancel
Previous
Next


Edit Field Mapping: Departments
Help for this page
Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.
Edit
Mapped Salesforce Object
CSV Header
Example
Example
Example
Change
Department Name
Department Name
Office of Co
Disability De
Division of Disability and Rehabilitative Services
Change
Department Code
Department code
O001
D001
D002
6
Cancel
Previous
Next





Note- Do Field mapping carefully.

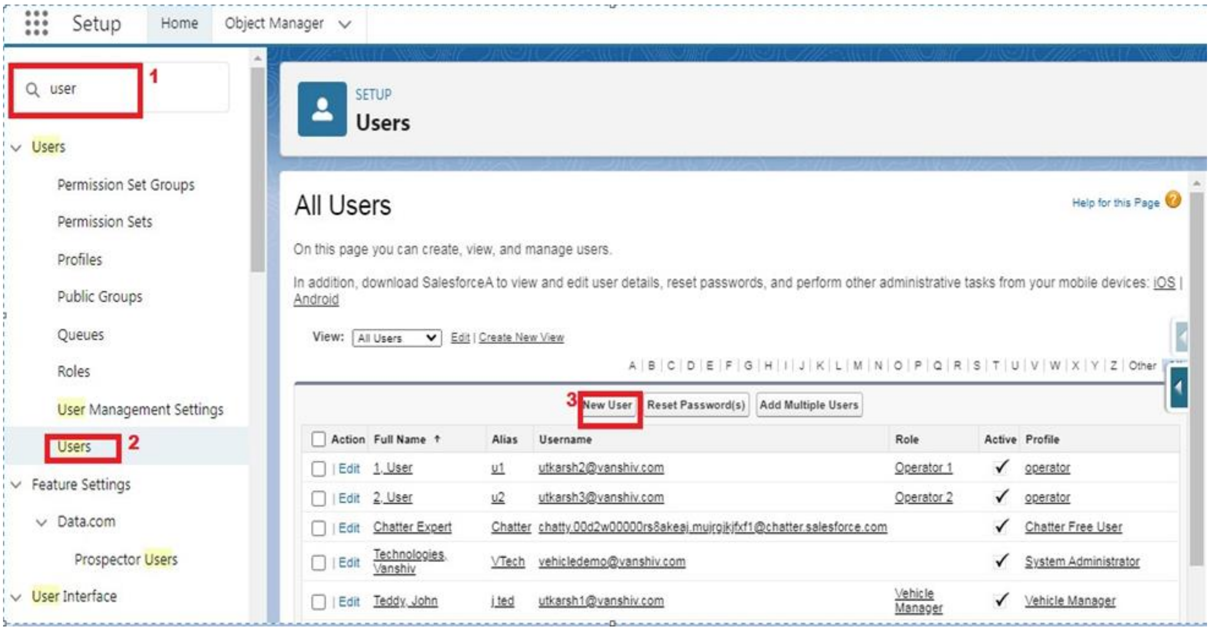
Creating A User In Salesforce

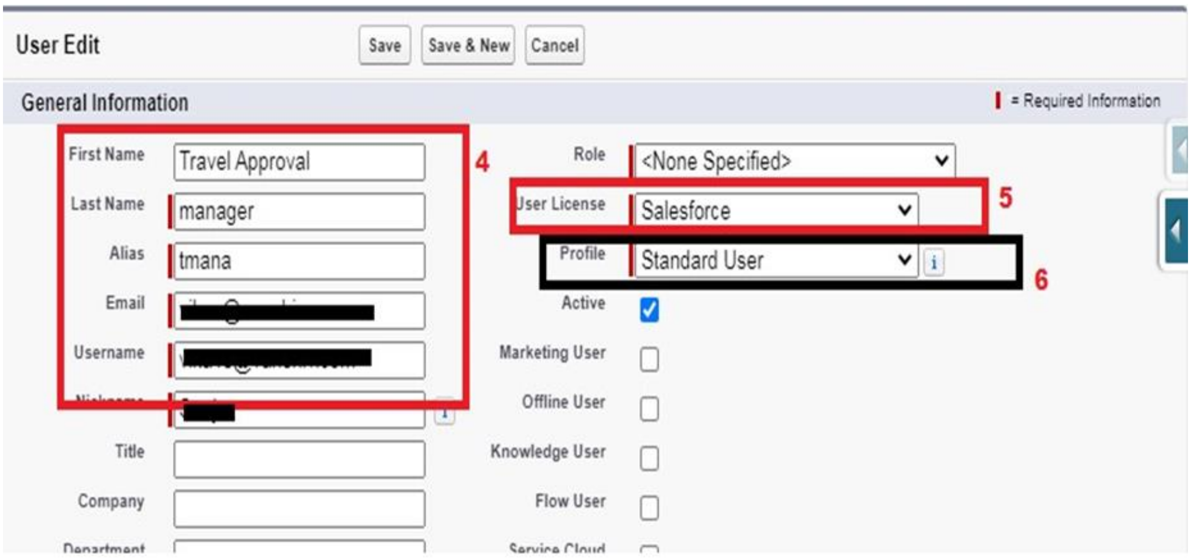
1.From Setup, in the Quick Find box, enter Users.
2.Select Users.
3.Click New User.
4.Enter the First Name Travel Approval and Last Name manager and (Your) email address and a unique username in the
form of an email address. By default, the username is the same as the email address.
5.Select a User License as Salesforce.

NOTE- *In the Developer edition Salesforce license can only be used by 2 Users at a time in Dev Org, If you don't find Salesforce license then deactivate a user who has Salesforce license Or change the license type from Salesforce to any other.*

6.Select a profile as Standard user.

7.Check Generate new password and notify the user immediately to have the user's login name and a temporary password
emailed to your email.

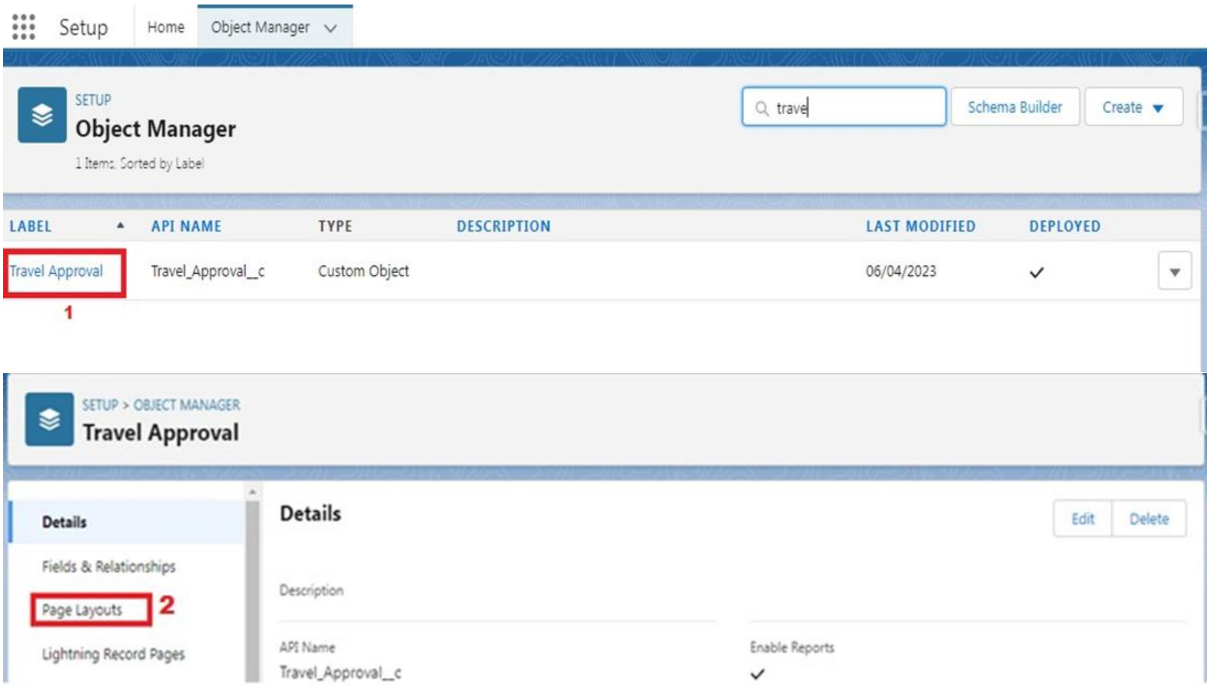


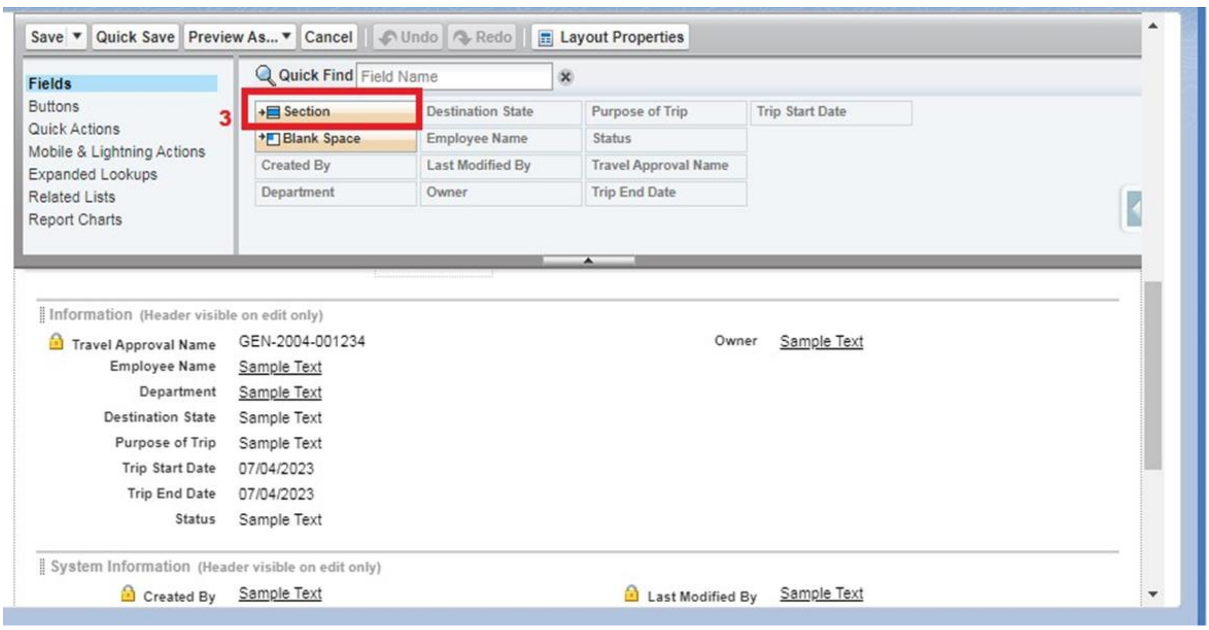


Customize Travel Approval Object Page Layout

1. From the Object Manager, search for the Travel approval object
2. click on page layouts and click Travel Approval Layout
3. Drag the Section from the top pane to the lower pane directly below the Information section. When dragging over the
page, you get a visual indicator of where you can drop the new section.
4. Name the section Trip Info, leave the rest of the settings at their default values, and
5. Then click on OK.
6. Drag Trip Start Date and Trip End Date, Status from the top pane into the left-hand column of the Trip Info
section.
7. Drag the Destination State and Purpose of a trip from, department the top pane into the right-

hand column of the Trip
Info section.
8. Click Save.



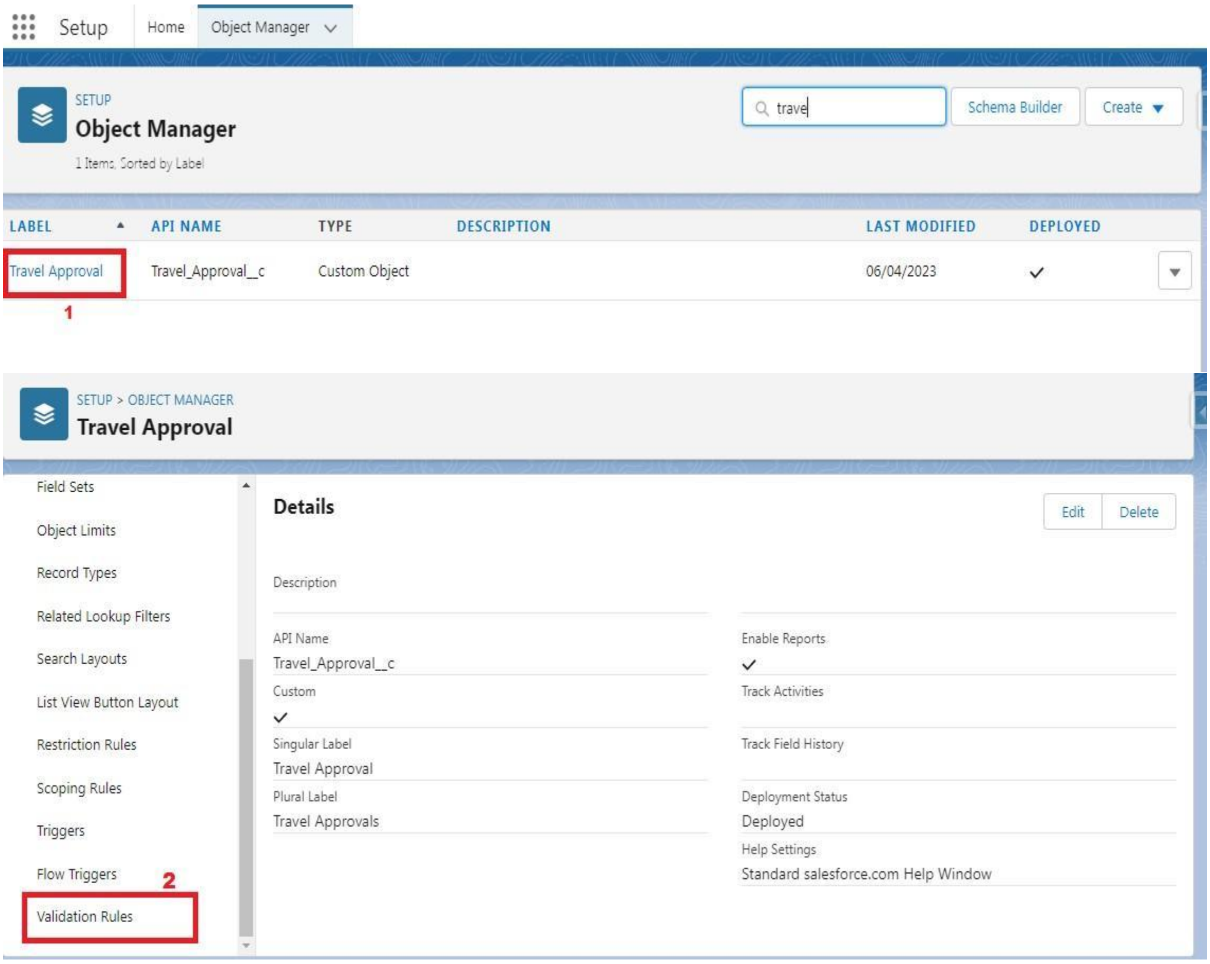


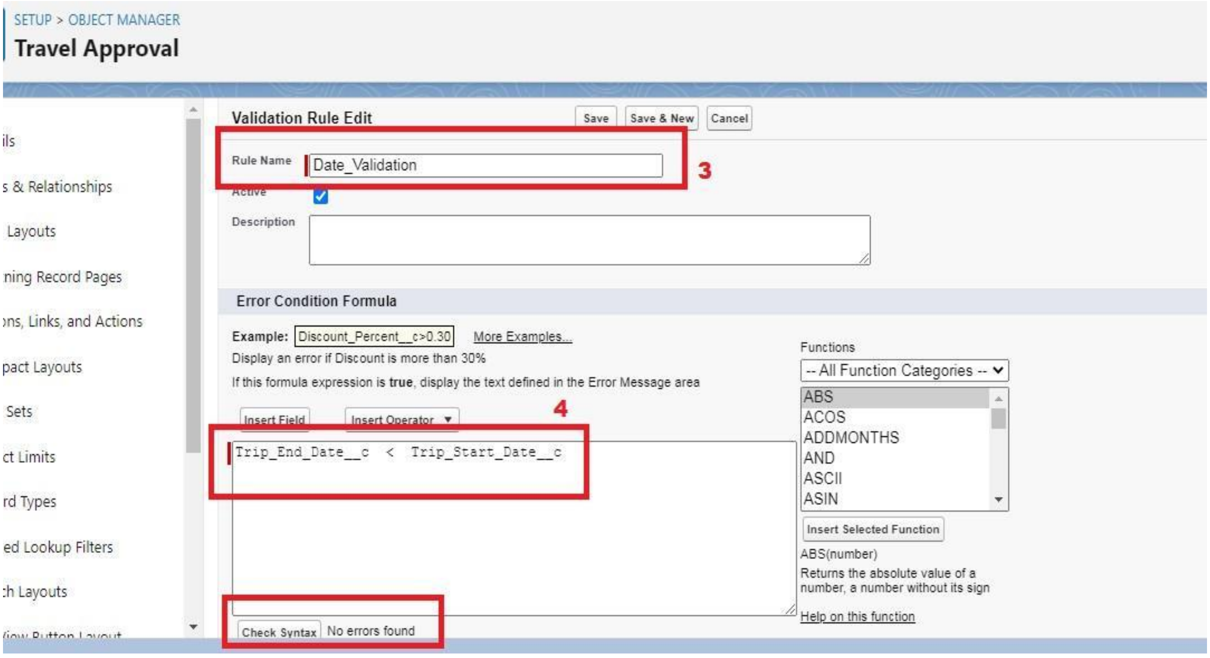
Create Validation Rule

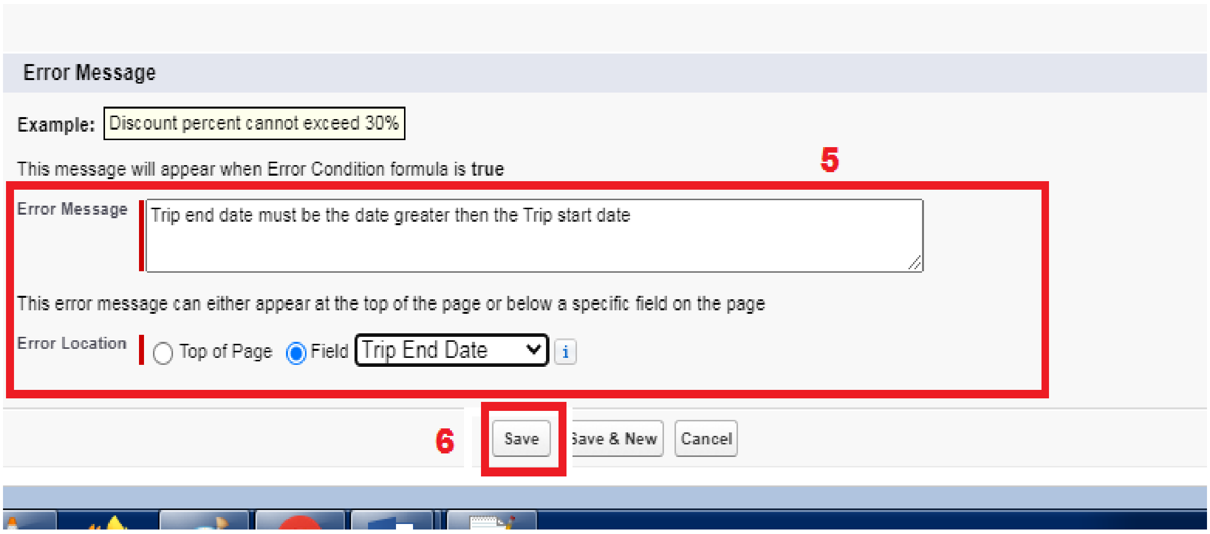
Search for the travel approval object from the object manager and open the object.
1)Click on validation rules and click new on the left corner
2)Give your rule name Date _Validation and make sure that the rule is set to active.
3)In the error condition formula enter Trip_End_Date c < Trip_Start_Date   c

NOTE- Make sure that there is no syntax error after you input this error condition

Give the Error message – “Trip end date must be the date greater than the Trip start date” & For error location select the field and pick the Trip end date as the location for error.
Click save







Create Formulae Fields

Create Formula Fields
1)First, we need to upload a zip file to your Salesforce environment that contains all the images we use. You should have 2)a file titled StatusImages.zip.
3)Click the setup
4)Click Static Resources in Quick Find & Click New.
5)Enter the following values for your static resource

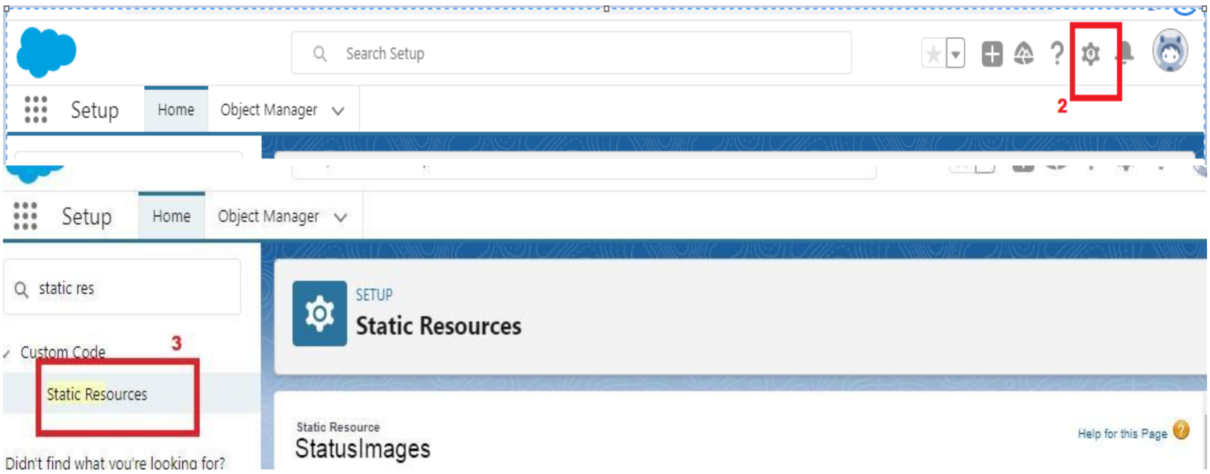
Parameter	Value
Name	StatusImages
File	StatusImages.zip
Cache-Control	Private

Now select the travel approval object.
Select Fields & Relationships, Click New
Select Formula data type, and Click Next.
Enter the following values:
Field Label: Status Indicator
Field Name: Status_Indicator (This automatically gets sent when you tab out of the Field Label field)
Formula Return Type: Tex

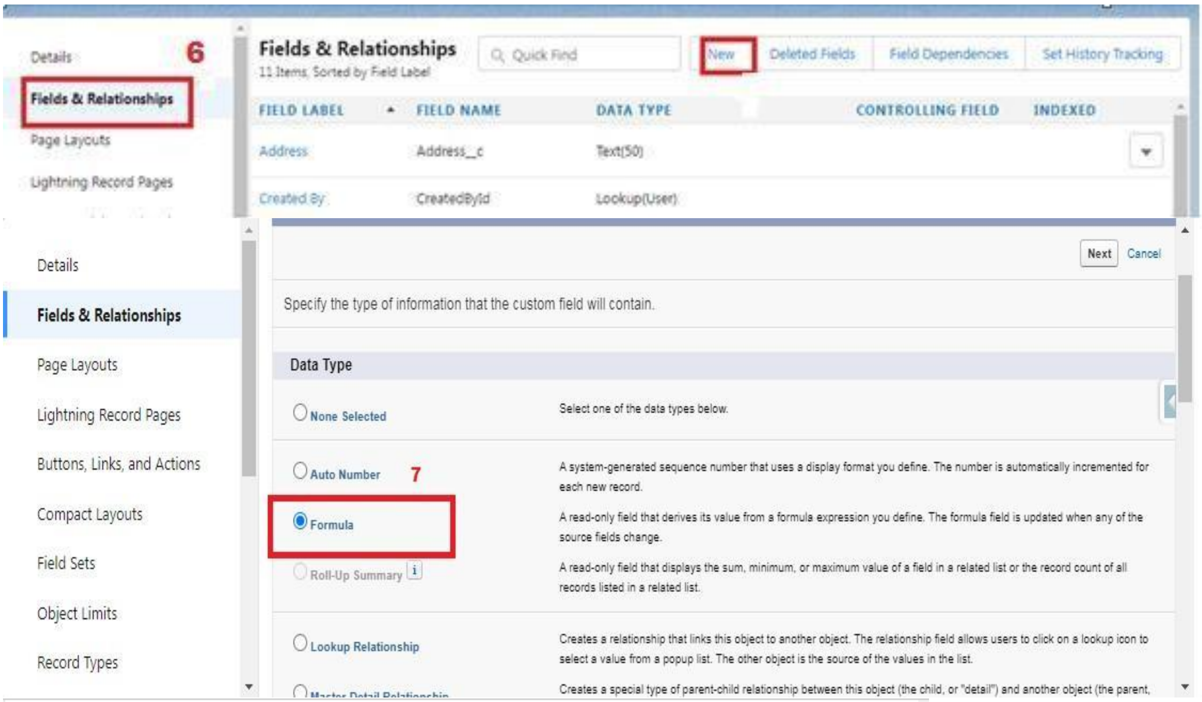
Click next & Copy and paste the following formula into the formula editor.

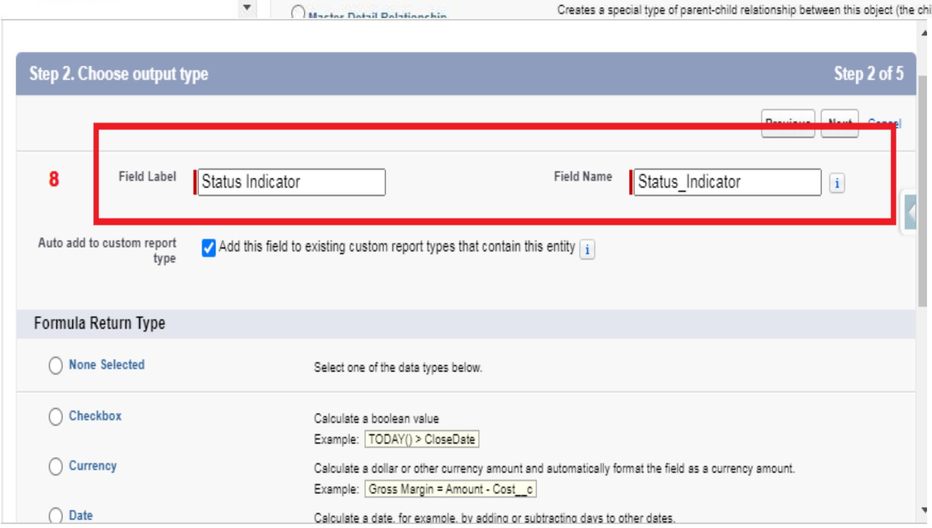
IF(ISPICKVAL(Status c c, 'Approved'), IMAGE("/resource/StatusImages/thumbs-up.png", "Accepted", 20, 20),
IF (ISPICKVAL(Status c c, 'Rejected'), IMAGE("/resource/StatusImages/thumbs-down.png", "Rejected", 20, 20), IMAGE("/resource/StatusImages/draft.png", "In-Process", 20, 20)))

Click Next, Next, Save.




Setup
Home
Object Manager
SETUP
Object Manager
1 Items, Sorted by Label
trave
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Travel Approval
Travel_Approval__c
Custom Object
06/04/2023
5

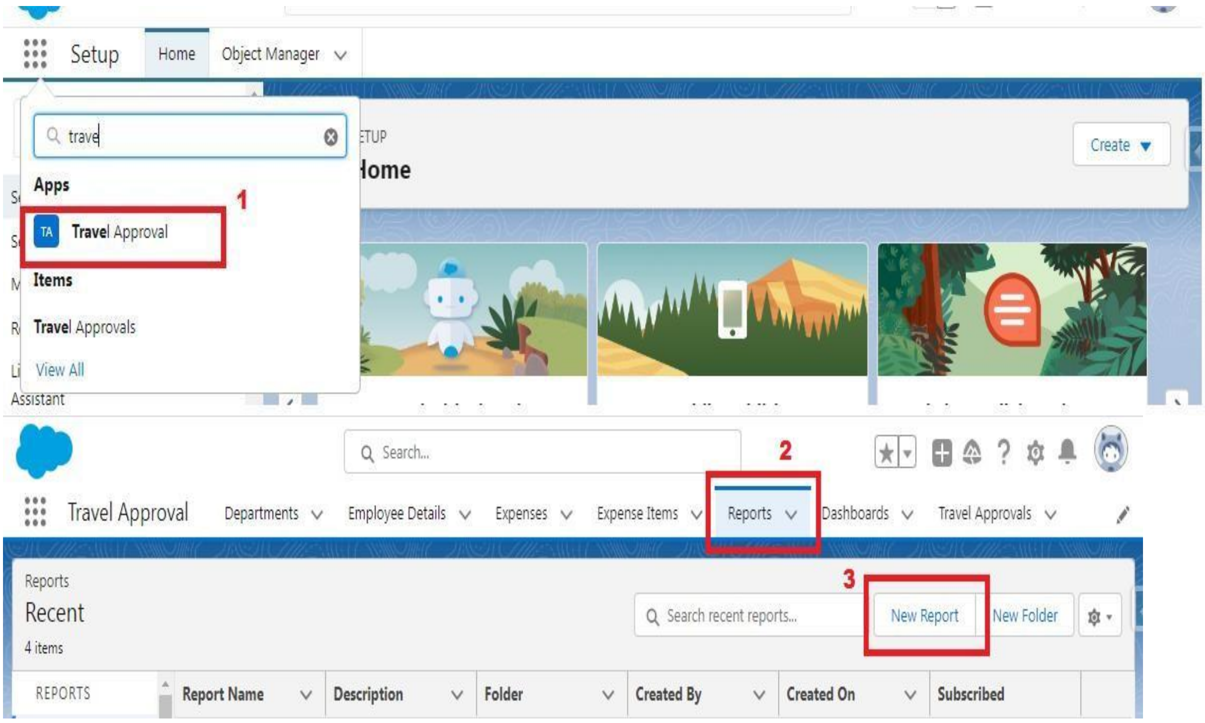

Details
6
Fields & Relationships
Page Layouts
Lightning Record Pages
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Address
Address__c
Text(50)
Created By
CreatedById
Lookup(User)
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
7
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.


Step 2. Choose output type
Step 2 of 5
8
Field Label
Status Indicator
Field Name
Status_Indicator
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date

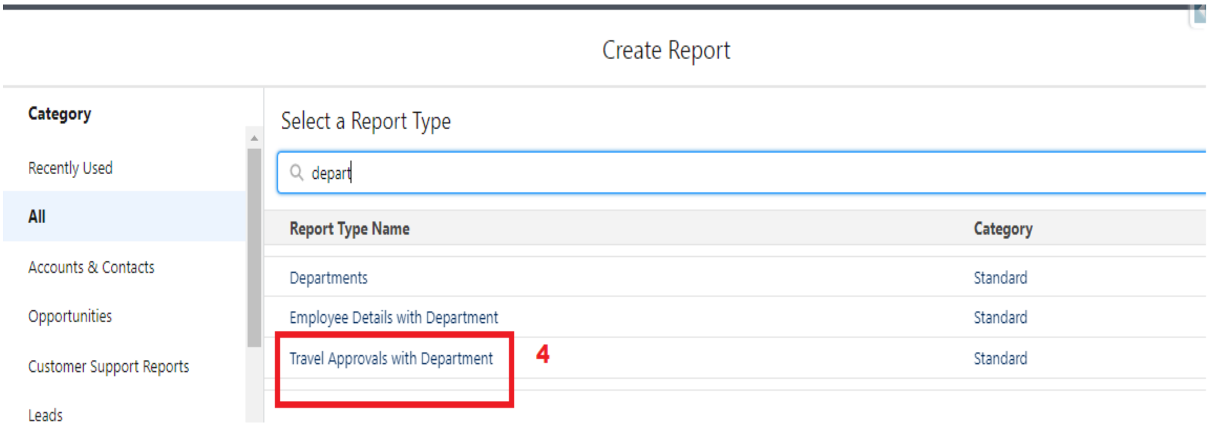
Create Record

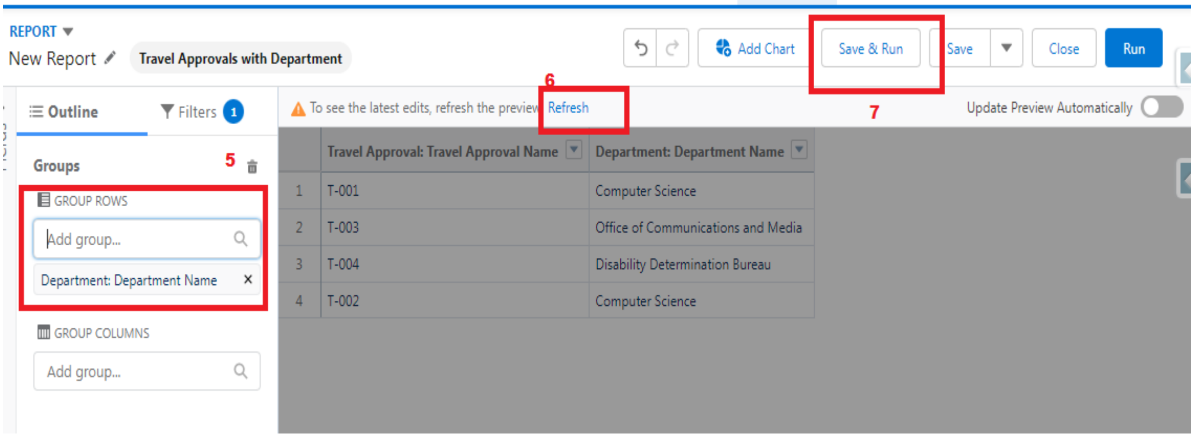
Click App Launcher and select Travel Approval App

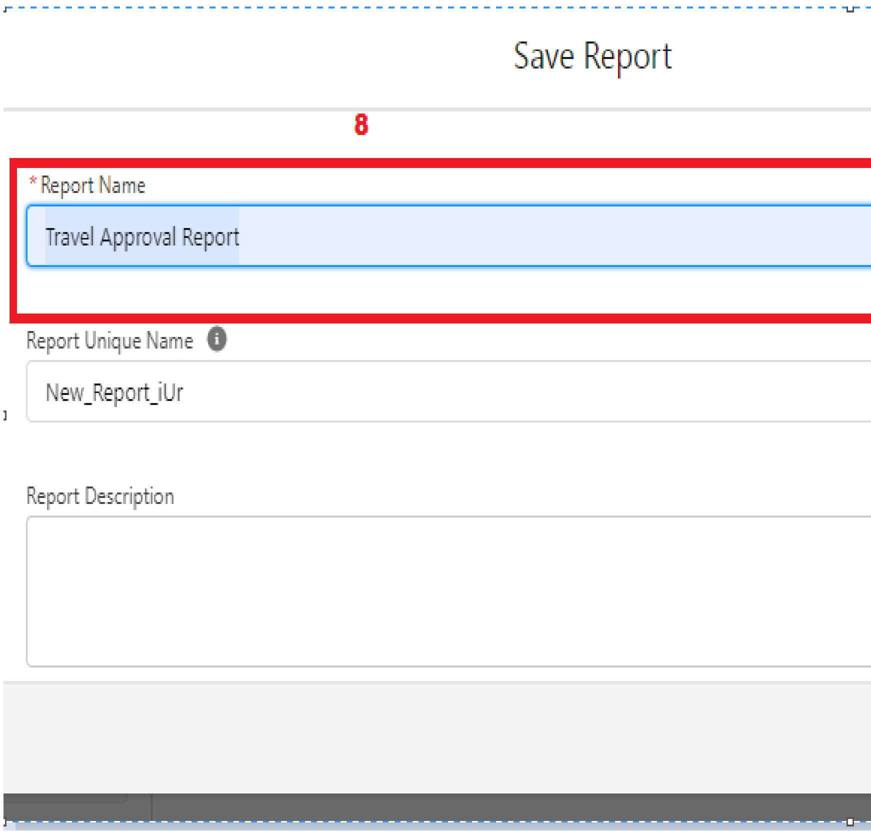
1)Click reports tab
2)Click New Report.
3)Click the report type as Travel approval with Departments Click Start report.
4)Customize your report, in group rows select - Department Name
5)Click refresh
6)Click save and run
7)Give report name – Travel Approval Report
8)Click Save



\

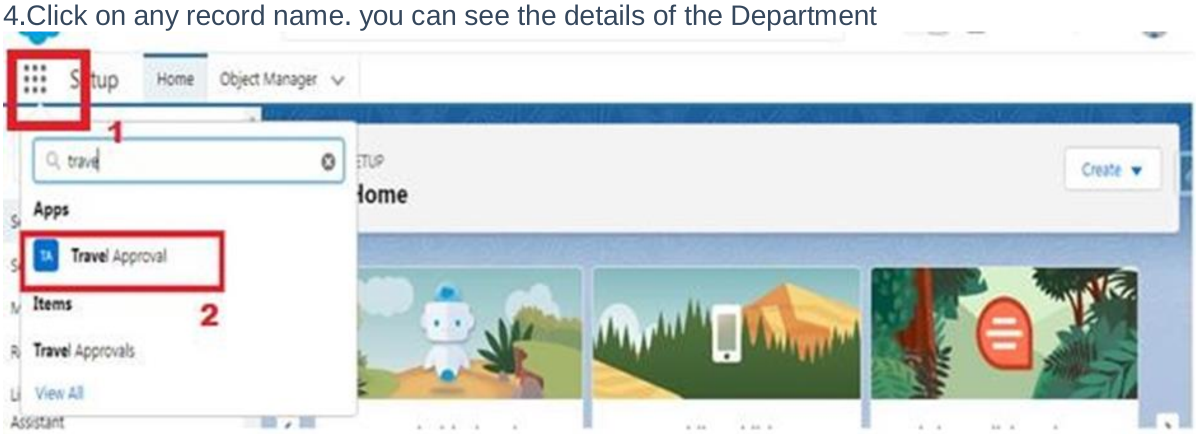

Create Report
Category
Recently Used
All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Select a Report Type
depart
Report Type Name
Category
Departments
Standard
Employee Details with Department
Standard
Travel Approvals with Department
Standard
4

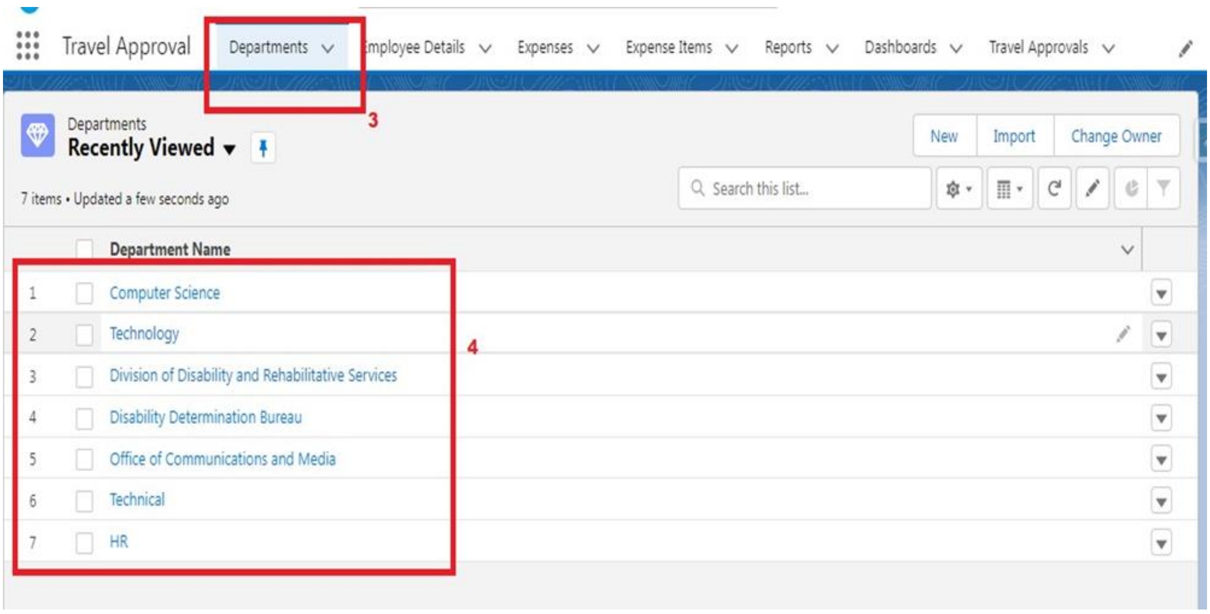

REPORT
New Report
Travel Approvals with Department
Add Chart
Save & Run
Save
Close
Run
Outline
Filters 1
To see the latest edits, refresh the preview
Refresh
6
7
Update Preview Automatically
Groups
5
GROUP ROWS
Add group...
Department: Department Name
GROUP COLUMNS
Add group...
Travel Approval: Travel Approval Name
Department: Department Name
1 T-001 Computer Science
2 T-003 Office of Communications and Media
3 T-004 Disability Determination Bureau
4 T-002 Computer Science


Save Report
8
* Report Name
Travel Approval Report
Report Unique Name
New_Report_iUr
Report Description

View Record

View Record (Department):
1.Click on App Launcher on left side of screen.
2.Search Travel Approval & click on it.
3.Click on Department Tab.
4.Click on any record name. you can see the details of the Department

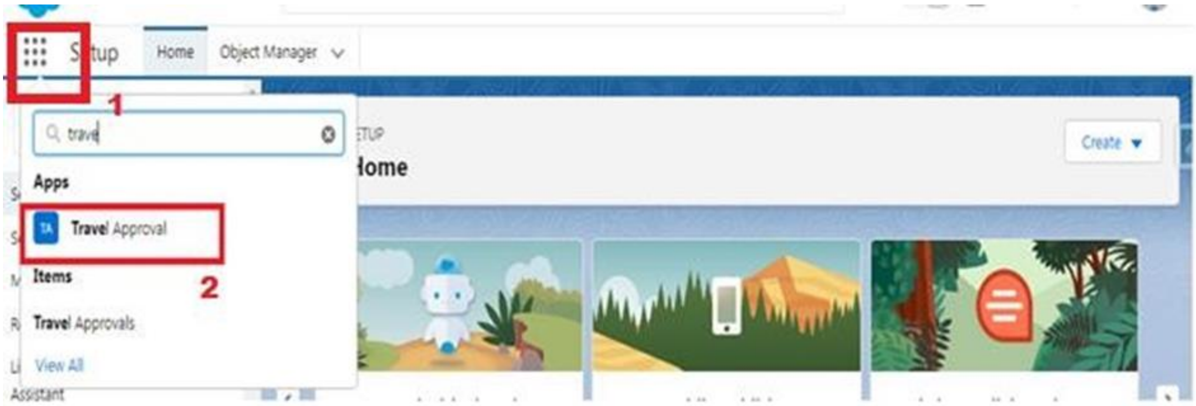


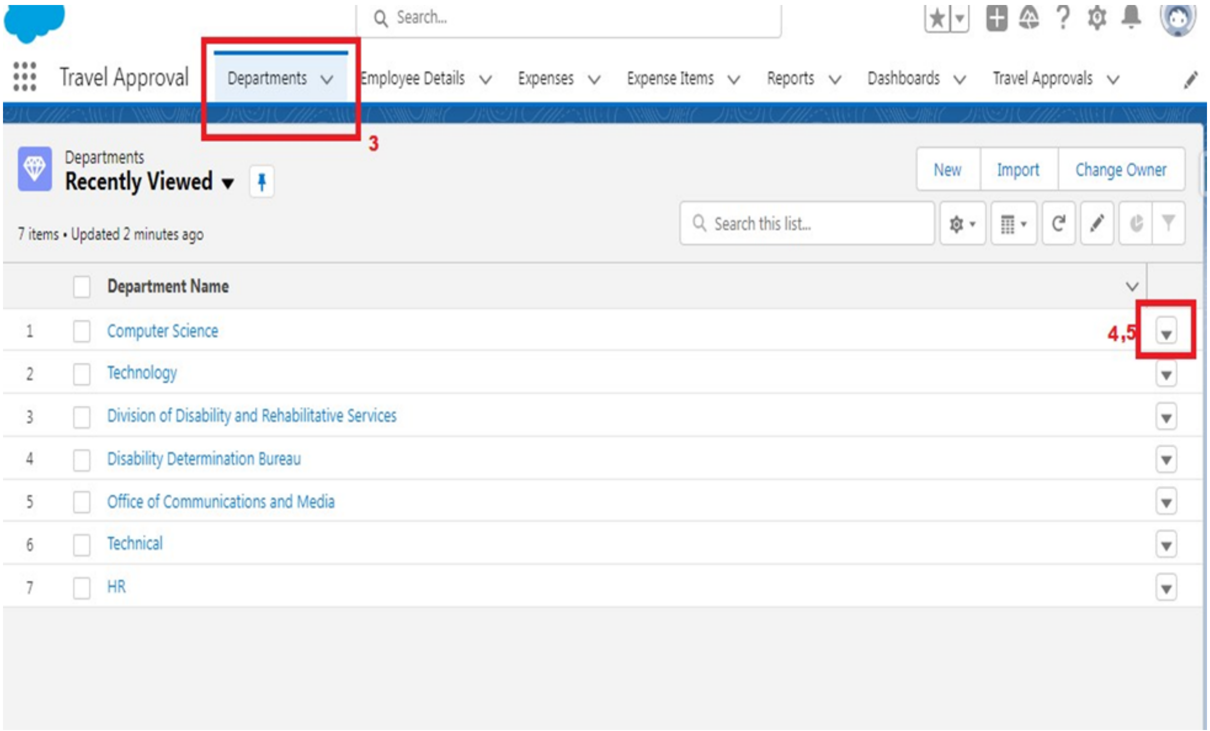


Delete Record

Delete Record (Department):

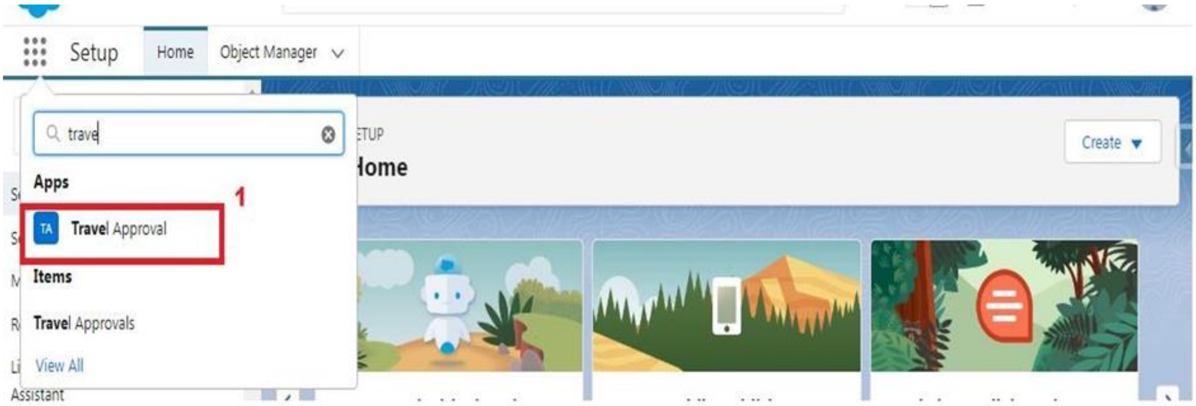
1. Click on App Launcher on the left side of the screen.
2. Search Travel Approval & click on it.
3. Click on Department Tab.
4. Click on Arrow at the right-hand side on that particular record.
5. Click delete and delete again.

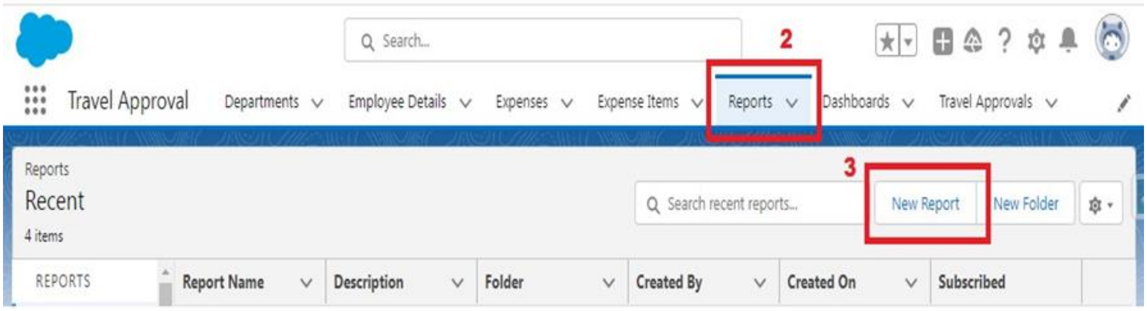


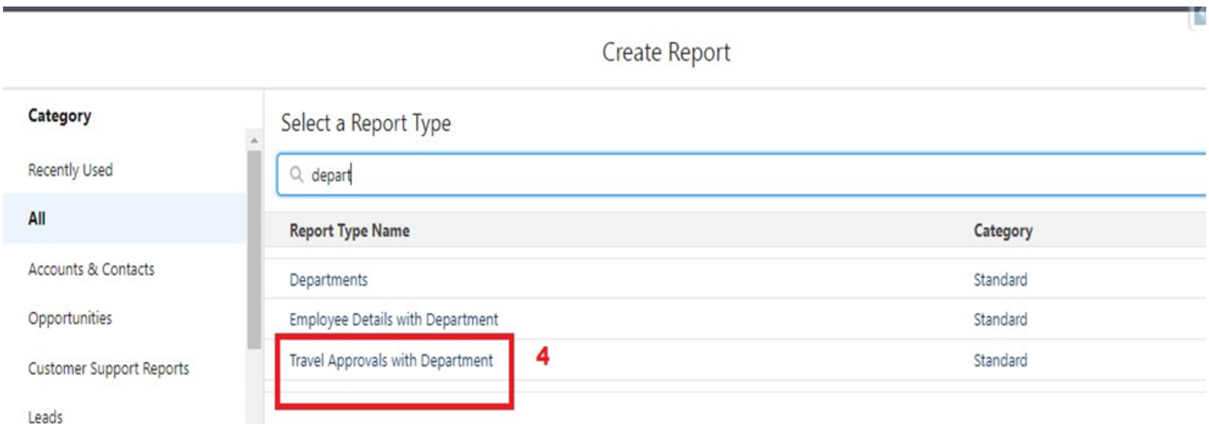


Create Report

1. Click App Launcher and select Travel Approval App
2. Click reports tab
3. Click New Report.
4. Click the report type as Travel Approval with Departments Click Start Report.
5. Customize your report, in group rows select - Department Name
6. Click Refresh
7. Click save and run
8. Give report name – Travel Approval Report
9. Click Save

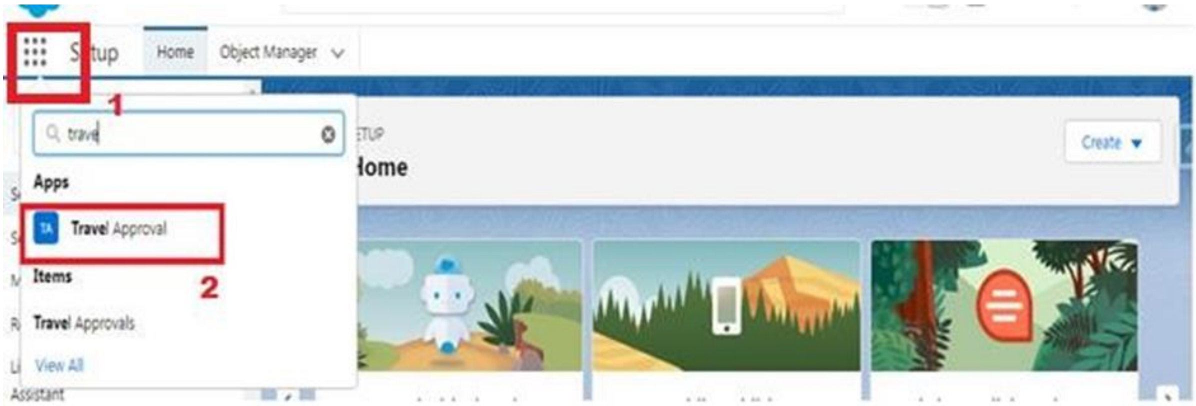


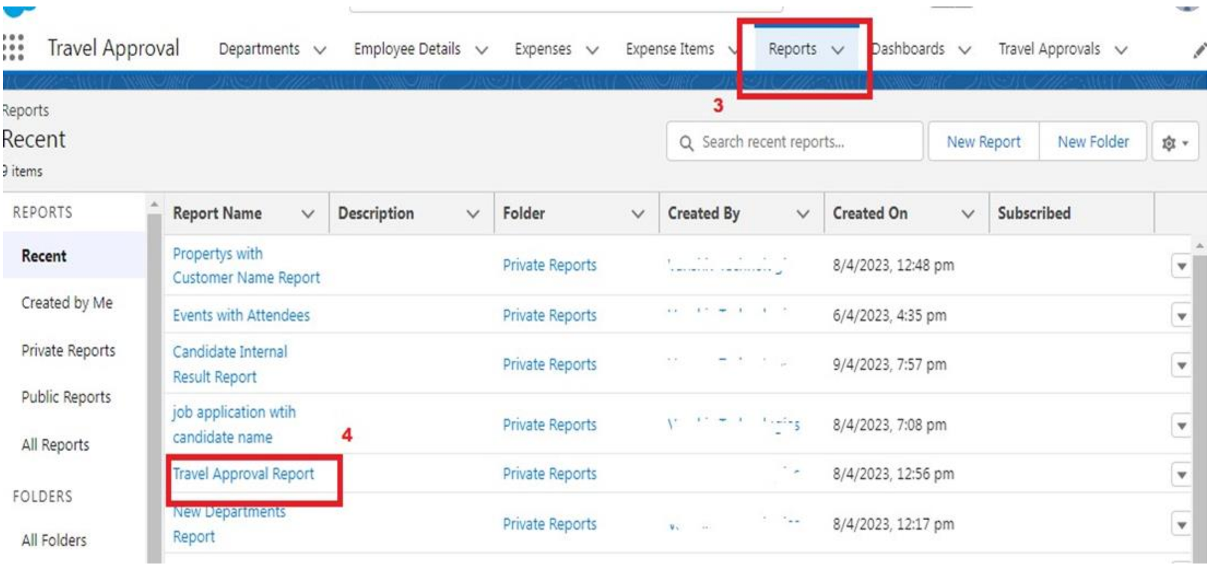




View Report

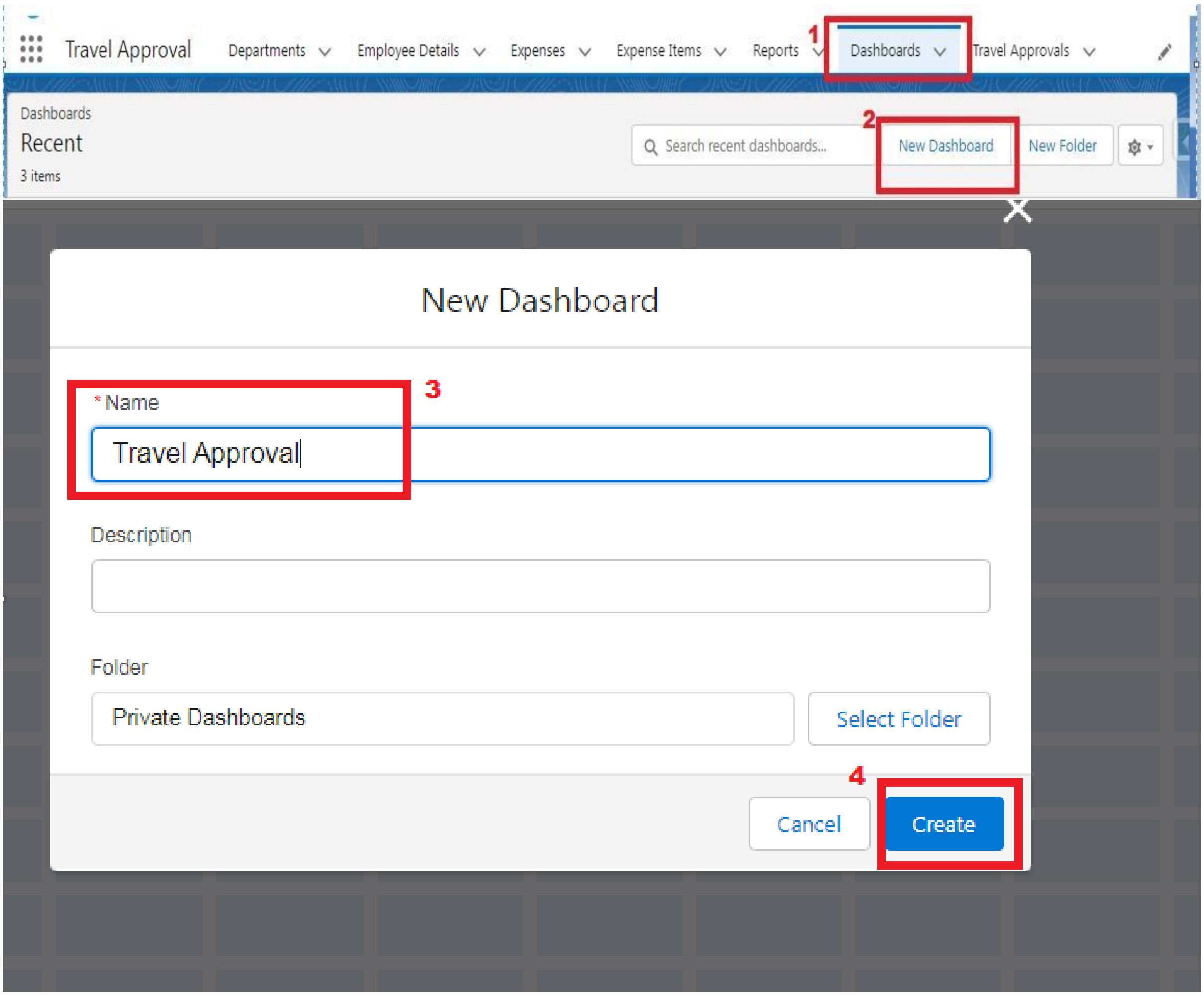
1.Click on App Launcher on left side of screen.
2.Search Travel Approval App & click on it.
3.Click on Reports Tab.
4.Click on Travel Approval Report and see records.

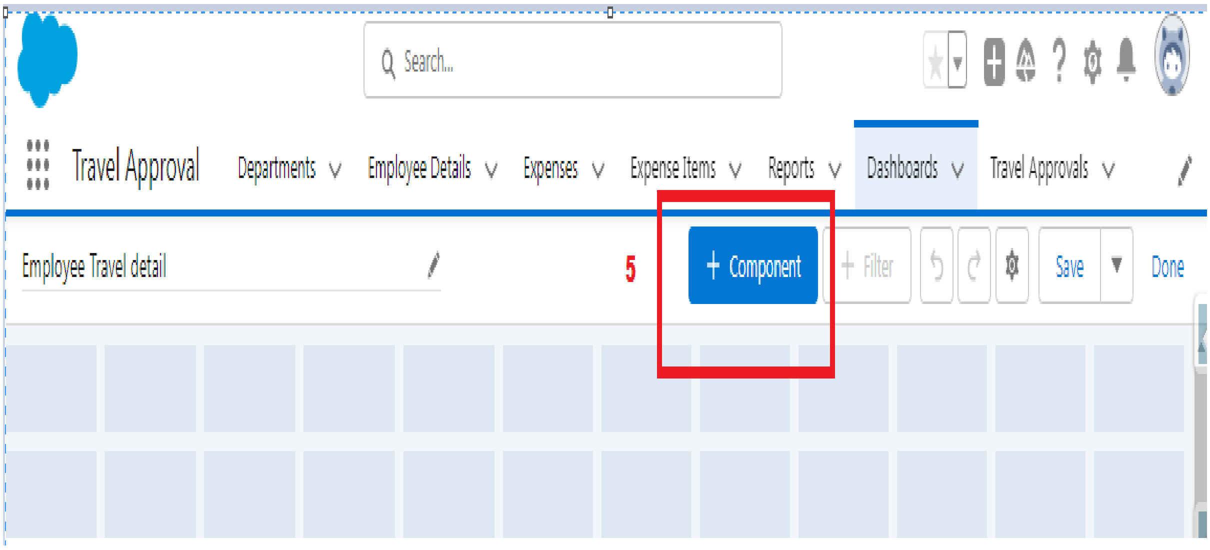


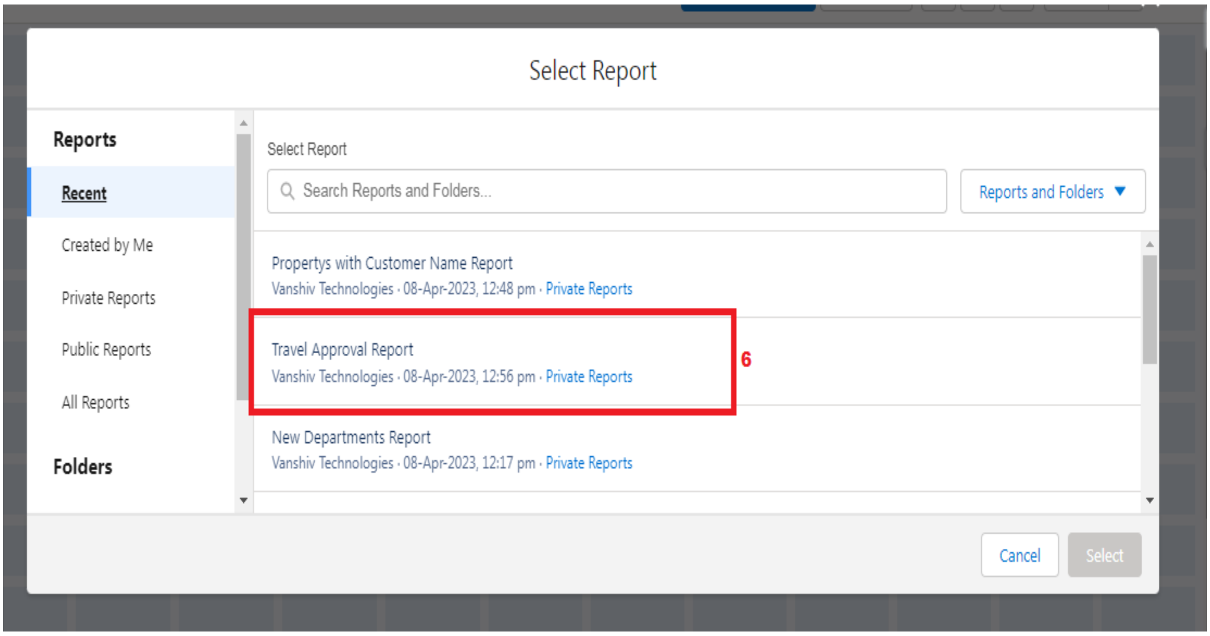


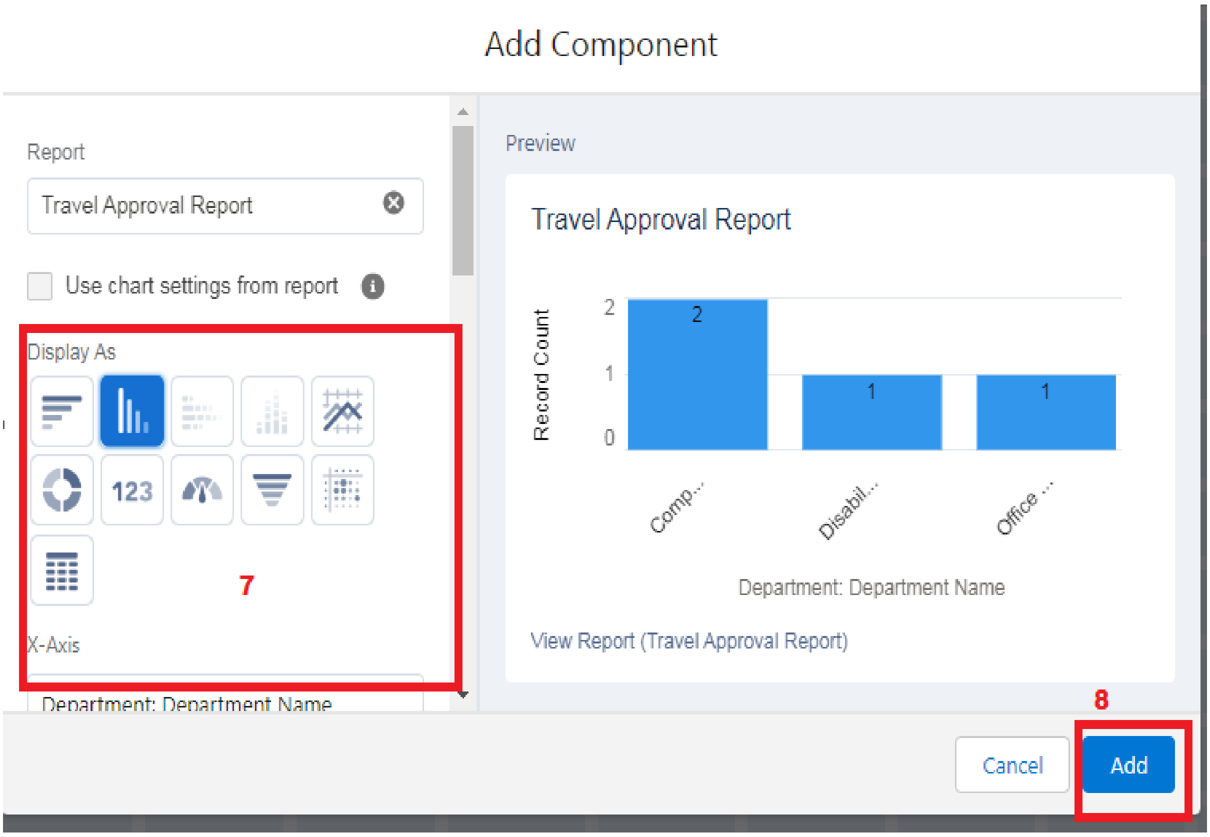
Create Dashboard

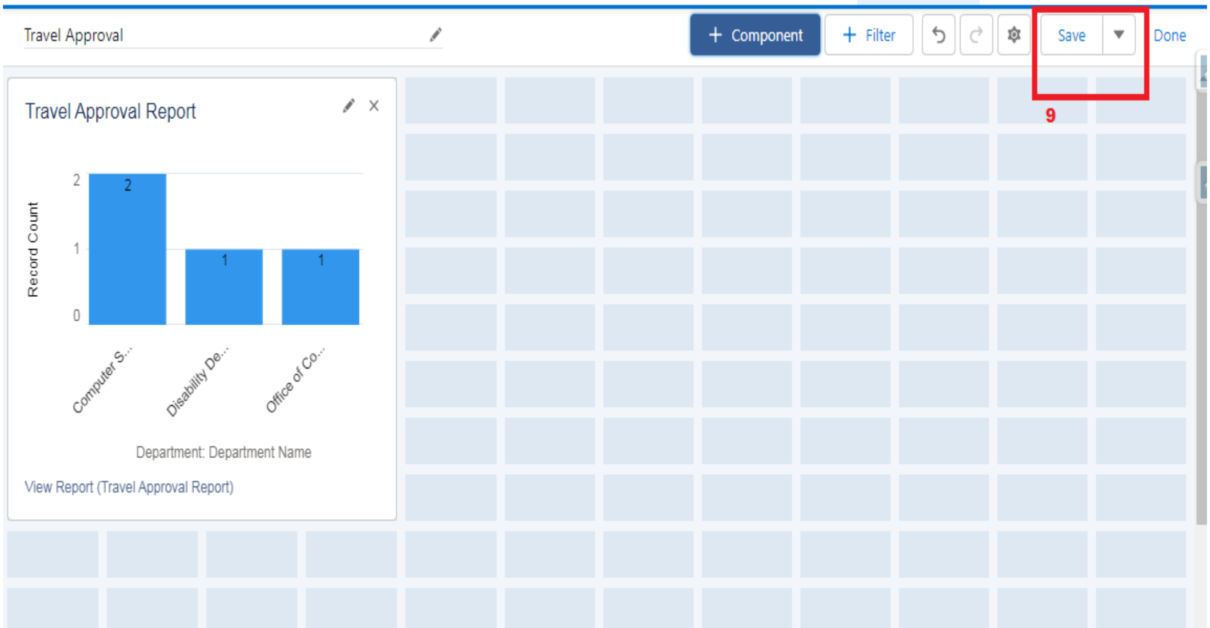
Click on the Dashboards tab from the travel approval application,
Click on a new dashboard
Give name- Travel Approval
Click Create
Give your dashboard a name and click on +component,
select the Travel Approval Report that you created.
For the data visualization select any of the chart, table etc as your wish.
Click add
Click save.


Travel Approval
Departments
Employee Details
Expenses
Expense Items
Reports
1
Dashboards
Travel Approvals
Dashboards
Recent
3 items
Search recent dashboards...
2
New Dashboard
New Folder
New Dashboard
* Name
3
Travel Approval
Description
Folder
Private Dashboards
Select Folder
4
Cancel
Create


Search...
Travel Approval
Departments
Employee Details
Expenses
Expense Items
Reports
Dashboards
Travel Approvals
Employee Travel detail
5
+ Component
+ Filter
Save
Done

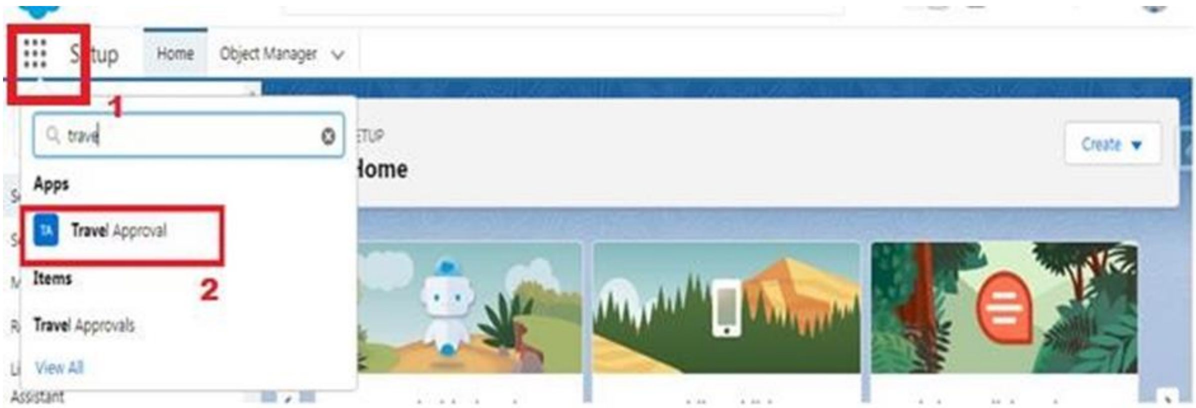

Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Select Report
Search Reports and Folders...
Reports and Folders
Propertys with Customer Name Report
Vanshiv Technologies · 08-Apr-2023, 12:48 pm · Private Reports
Travel Approval Report
Vanshiv Technologies · 08-Apr-2023, 12:56 pm · Private Reports
6
New Departments Report
Vanshiv Technologies · 08-Apr-2023, 12:17 pm · Private Reports
Cancel
Select

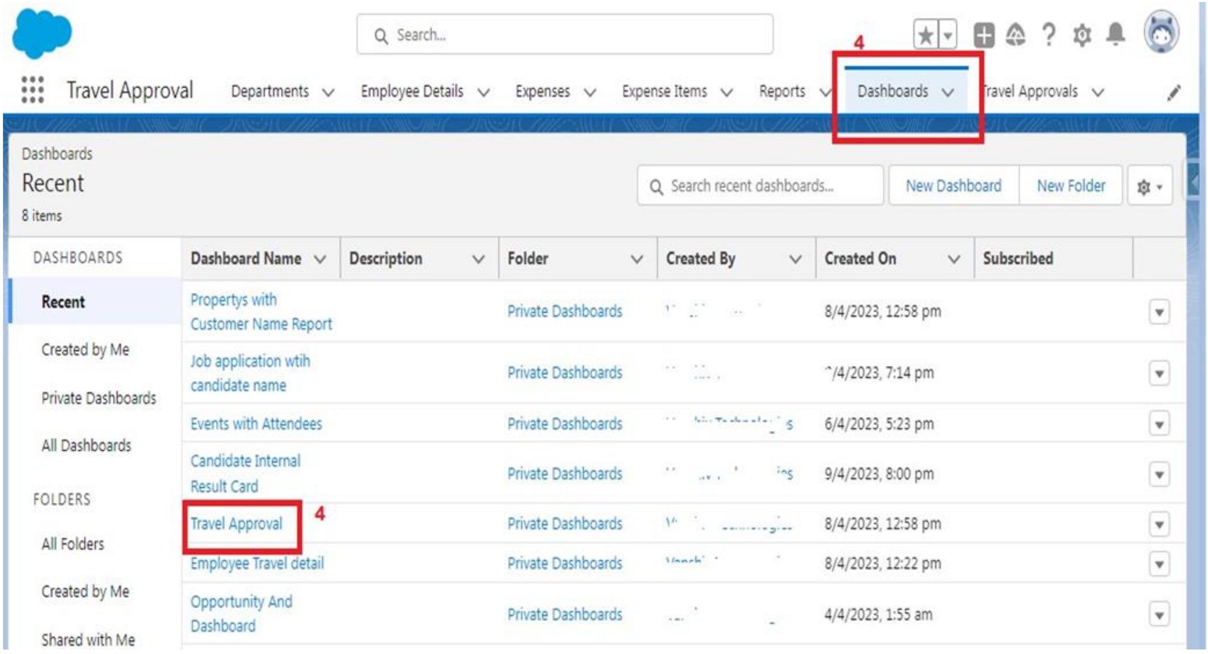

Add Component
Report
Travel Approval Report
Use chart settings from report
Display As
123
7
X-Axis
Department: Department Name
Preview
Travel Approval Report
Record Count
2
1
0
2
1
1
Comp...
Disabil...
Office ...
Department: Department Name
View Report (Travel Approval Report)
8
Cancel
Add



View Dashboard

1.Click on App Launcher on left side of screen.
2.Search Travel Approval App & click on it.
3.Click on Dashboard Tab.
4.Click on Travel Approval and see graph view of records




Search...
4
Travel Approval
Departments
Employee Details
Expenses
Expense Items
Reports
Dashboards
Travel Approvals
Dashboards
Recent
8 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
Dashboard Name
Description
Folder
Created By
Created On
Subscribed
Propertys with Customer Name Report
Private Dashboards
8/4/2023, 12:58 pm
Job application wtih candidate name
Private Dashboards
Events with Attendees
Private Dashboards
6/4/2023, 5:23 pm
Candidate Internal Result Card
Private Dashboards
9/4/2023, 8:00 pm
Travel Approval
4
Private Dashboards
8/4/2023, 12:58 pm
Employee Travel detail
Private Dashboards
8/4/2023, 12:22 pm
Opportunity And Dashboard
Private Dashboards
4/4/2023, 1:55 am