

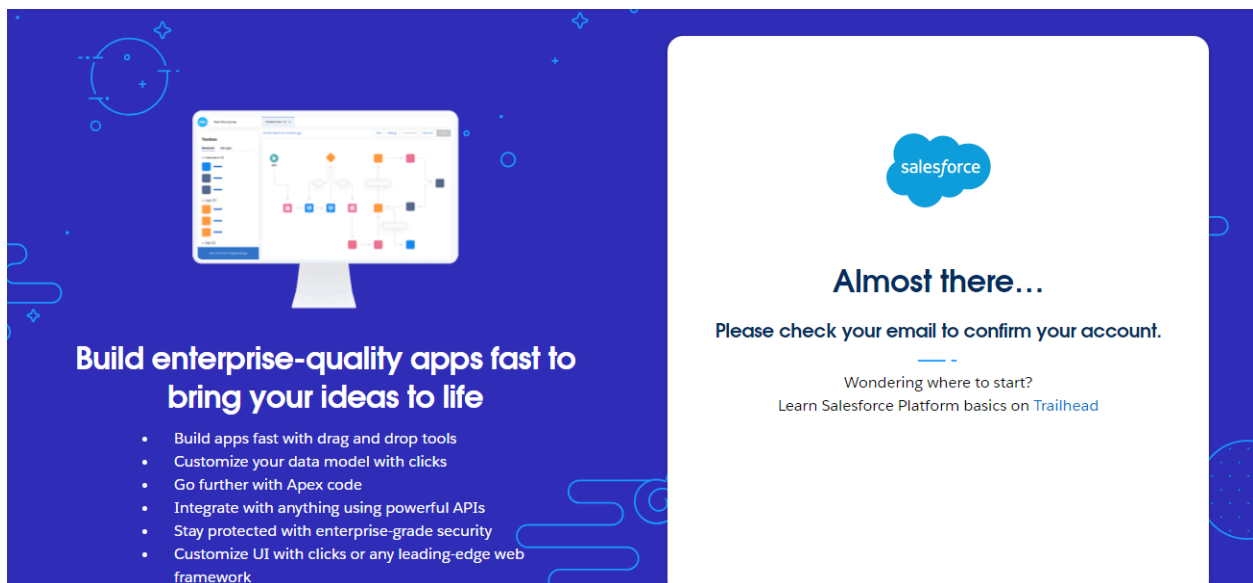
Day 1 :

Topic: Create Salesforce Developer Organization

Milestone/Activities:

- 1) Create Salesforce Organization
- 2) Creating Developer Account
- 3) Account Activation

ScreenShots:





Username

raksha5012022@gmail.com

Password

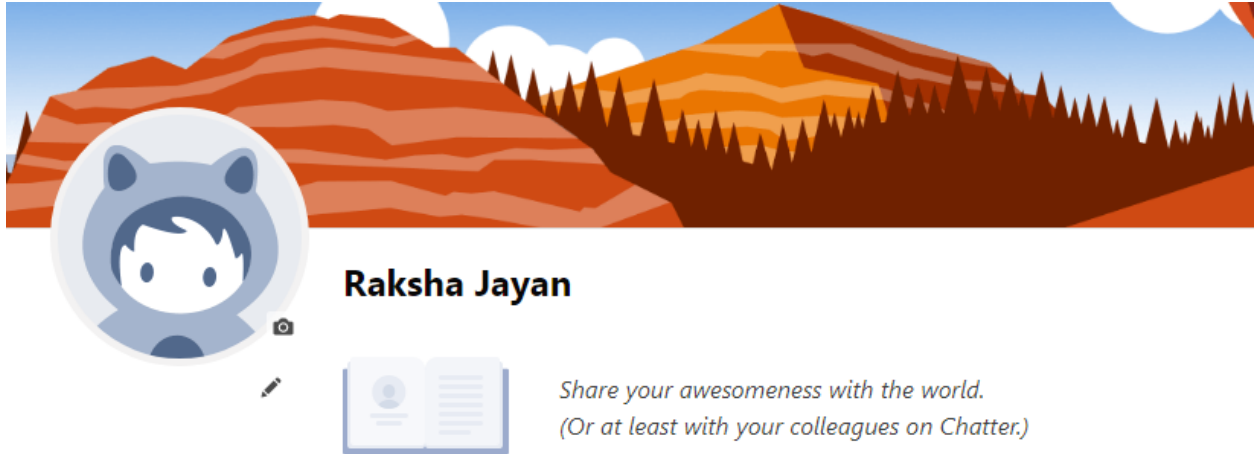
.....

Log In

☐ Remember me

[Forgot Your Password?](#)

Salesforce Account Created:



Day 2:

Topic: Setting up First APP , Custom Object And Field Creation

MileStones/ Activities:

1)Creating College Management Application

2) Creating Custom Objects:

- *College

- *Application Form

- *Student

- *Subjects

3) Creating Custom Fields under Each above Mentioned Objects

Detailed Description :

Created Various Custom Objects under the College Management Application .

Created Fields for each object using Fields and relationship tab under Object Manager

Created Fields with Data types - Currency , Texts , Formula

Set up Validation Rule for the field Record Info and Created Global Picklist Values.

ScreenShot :

Object Creation -

SETUP > OBJECT MANAGER

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Description

API Name

college__c

Custom

✓

Singular Label

college

Plural Label

colleges

Enable Reports

Track Activities

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

2) Application Form Object:

SETUP > OBJECT MANAGER

Application Form

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Details

Description

API Name

Application_Form__c

Custom

✓

Singular Label

Application Form

Plural Label

Application Forms

Enable Reports

Track Activities

Track Field History

Deployment Status

Not Deployed

3) Student

SETUP > OBJECT MANAGER

Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Details

Description

API Name

Student__c

Custom

✓

Singular Label

Student

Plural Label

Students

Enable Reports

Track Activities

Track Field History

Deployment Status

Not Deployed

4) Subject:

SETUP > OBJECT MANAGER

Subject

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Details

Description

API Name
Subject__c

Custom
✓

Singular Label
Subject

Plural Label
Subjects

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Fields In College, Application Form, Subject and Student objects:

SETUP > OBJECT MANAGER

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College Email	College_Email__c	Picklist	College Name	
College Fee	College_Fee__c	Currency(7, 2)		
College Name	College_Name__c	Picklist		
Created By	CreatedById	Lookup(User)		
Hostel Fee	Hostel_Fee__c	Currency(6, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
Number Of Seats	Number_Of_Seats__c	Picklist	College Name	
Owner	OwnerId	Lookup(User,Group)		✓

Application Form

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for

Fields & Relationships

14 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(255)		
Application Form ID	Name	Auto Number		✓
college	college__c	Master-Detail(college)		✓
College Fee	College_Fee__c	Formula (Currency)		
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Email	Email__c	Email (Unique)		✓



Subject

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Paper 1	Paper_1__c	Picklist		
Paper 2	Paper_2__c	Picklist		
Student	Student__c	Lookup(Student)		✓
Subject ID	Name	Auto Number		✓

Student

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Search Layouts for

Fields & Relationships

8 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(255)		
Application Form	Application_Form__c	Lookup(Application Form)		✓
Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Student Name	Name	Text(80)		✓

Day 3

Topic: Adding Business Logic To Application

Milestone / Activities:

Creating Global Picklist Values

creating Field dependencies

creating Validation Rules

Process Automation

Detailed Description

created a global picklist values and assigned them to the fields.

created field dependencies using lookup field and created connection between fields

created Validation Rules to enter the same college name in both the fields

created process builder to automate the student record collection with the data from application Rule

uploading screenshot:

Global picklist for college name field

SETUP
Picklist Value Sets

Global Value Set Detail

▼ Information

Label	College Names
Name	College_Names
Description	List Of Colleges


Picklist Values Used

Active and inactive picklist values 7 (1,000 max)

Edit Delete

Values New Reorder Replace Printable View Chart Colors ▼

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Avinashilingam University	Avinashilingam University	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan 1/5/2022, 2:15 AM
Edit Del Deactivate	CIT	CIT	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan 1/5/2022, 2:15 AM
Edit Del Deactivate	GCT	GCT	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan 1/5/2022, 2:15 AM
Edit Del Deactivate	IIT-Chennai	IIT-Chennai	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan 1/5/2022, 2:15 AM
Edit Del Deactivate	MIT- BLR	MIT- BLR	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan 1/5/2022, 2:15 AM
Edit Del Deactivate	MIT - Delhi	MIT - Delhi	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan 1/5/2022, 2:15 AM
Edit Del Deactivate	PSG	PSG	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan 1/5/2022, 2:15 AM


Picklist Value Sets

▼ Information

Label

Paper 1

Name

Paper_1

Description

Picklist Values Used

Active and inactive picklist values 4 (1,000 max)

Edit

Delete

Values

New

Reorder

Replace


Printable View

Chart Colors ▼

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	Apex	Apex	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan , 1/5/2022, 10:50 AM
Edit Del Deactivate	C	C	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan , 1/5/2022, 10:50 AM
Edit Del Deactivate	C++	C++	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan , 1/5/2022, 10:50 AM
Edit Del Deactivate	Java	Java	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan , 1/5/2022, 10:50 AM

Inactive Values

global picklist value for Paper 2 field in subject object


Picklist Value Sets

▼ Information

Label

Paper 2

Name

Paper_2

Description

Picklist Values Used

Active and inactive picklist values 3 (1,000 max)

Edit

Delete

Values

New

Reorder

Replace

Printable View

Chart Colors ▼

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Deactivate	English	English	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan , 1/5/2022, 10:51 AM
Edit Del Deactivate	Mathematics	Mathematics	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan , 1/5/2022, 10:51 AM
Edit Del Deactivate	Statistics	Statistics	<input type="checkbox"/>	Assigned dynamically	Raksha Jayan , 1/5/2022, 10:51 AM

Inactive Values

Creating Validation Rules
College Validation Rule

SETUP > OBJECT MANAGER

college

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

college Validation Rule

Back to college

Validation Rule Detail

Edit

Clone

Rule Name	Record_Info_Similar	Active	✓
Error Condition Formula	TEXT(College_Name__c) <> Name		
Error Message	College Name should be same as record info	Error Location	Top of Page
Description	College Name should be same as record info		
Created By	Raksha Javan, 1/5/2022, 3:02 AM	Modified By	Raksha Javan, 1/5/2022, 3:04 AM

Edit

Clone

Validation Rule for Application Form

SETUP > OBJECT MANAGER

Application Form

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Application Form Validation Rule

Back to Application Form

Validation Rule Detail

Edit

Clone

Rule Name	Student_Validation_Rule	Active	✓
Error Condition Formula	AND(Ready_To_Join__c == true, OR(ISCHANGED(Address__c), ISCHANGED(college__c), ISCHANGED(Date_of_Birth__c), ISCHANGED(Email__c), ISCHANGED(Gaurdian_Name__c), ISCHANGED(Phone__c)))		
Error Message	Application Form Cannot be created Once the Student record is created	Error Location	Top of Page
Description			
Created By	Raksha Javan, 1/6/2022, 12:16 AM	Modified By	Raksha Javan, 1/6/2022, 12:16 AM

Edit

Clone

Process Builder for Student Object

creates a student record automatically when Ready to join is checked in the Application form Object

Setup

Home

Object Manager

Process Builder

Back To Setup

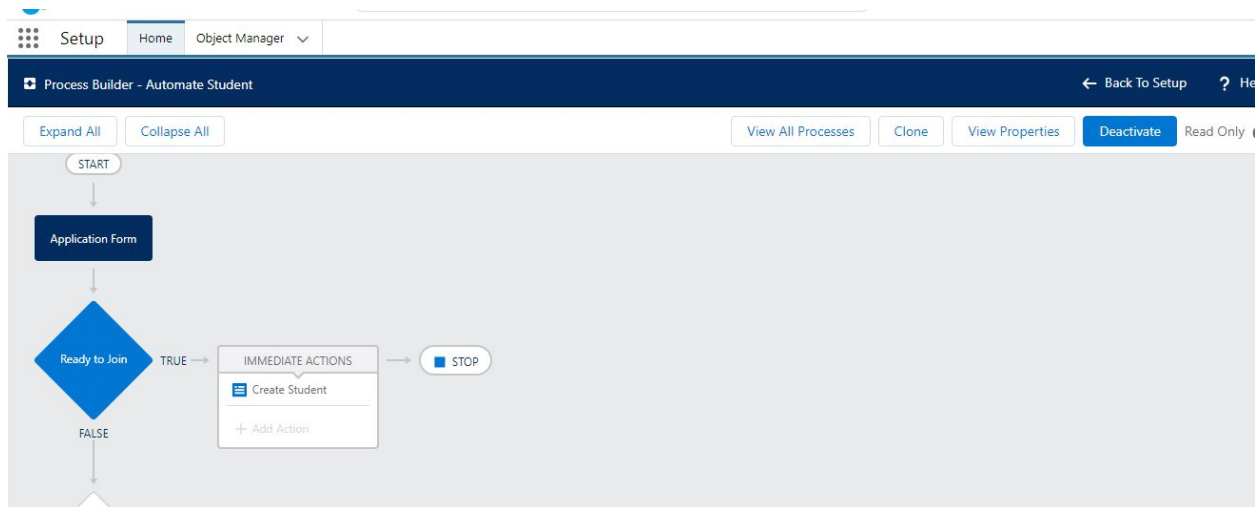
Help

My Processes

1 items

New

PROCESS	DESCRIPTION	OBJECT	PROCESS TYPE	LAST MODIFIED	STATUS	ACTIONS
> Automate Student		Application Form	Record Change	1/6/2022	Active	



Day 4:

Topic:

Creating Email Template
workflow

Milestone / Activities:

We created a Email temolplate with Dynamic Values and then sent an email Alert when an application Form is created

And creating a Flow using Flow builder..

Detailed Description

We created a Email temolplate with Dynamic Values and then sent an email Alert when an application Form is created

created a process automation using flow builder where a student record is automatically created while ready to join checkbox is selected while creating an application form.

Uploading Screenshot:

Creating Email Alert

[Rules Using This Email Alert \(0\)](#) | [Approval Processes Using This Email Alert \(0\)](#) | [Entitlement Processes Using This Email Alert \(0\)](#)

Email Alert Detail

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

Description	Email to Students	Email Template	Test Email Template
Unique Name	Email_to_Students	Object	Application Form
From Email Address	Current User's email address		
Recipients	User: Integration User User: Security User User: Raksha Jayan		
Additional Emails			
Created By	Raksha Jayan , 1/8/2022, 2:30 AM		Modified By Raksha Jayan , 1/8/2022, 2:30 AM
<div>EditDeleteClone</div>			

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

Creating Email Template:

Email Template Detail

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

Folder	Unfiled Public Classic Email Templates		
Email Template Name	Test Email Template	Available For Use	<input checked="" type="checkbox"/>
Template Unique Name	Test_Email_Template	Last Used Date	
Encoding	Unicode (UTF-8)	Times Used	
Author	Raksha Jayan [Change]		
Description			
Created By	Raksha Jayan , 1/8/2022, 2:25 AM	Modified By	Raksha Jayan , 1/8/2022, 2:28 AM

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

Email Template

[Send Test and Verify Merge Fields](#)[Subject](#) | [Testing](#)

Plain Text Preview

Hi {!Application_Form__c.Student_Name__c},
Welcome to {!Application_Form__c.college__c}
Your College Fee is {!Application_Form__c.College_Fee__c}.
Regards,
System Administrator

Email received screenshot:

Once the Email ALert and email template is set , when we create an application form a student record is created automatically and the student will receive an email.

Testing > Inbox x



Raksha Jayan via [h23j300rvozyqr.5j-5hkdeas.ap27.bnc.salesforce.com](#)
to [integration@example.com](#), [insightssecurity@example.com](#), me ▾



Be careful with this message

This may be a spoofed message. The message claims to have been sent from your actual source. Avoid clicking links or replying with sensitive information, unless the message is from a trusted source. (No need to reset your password, the real sender does not actually have access to your account.)

Report spam

Looks safe

Hi Sai,

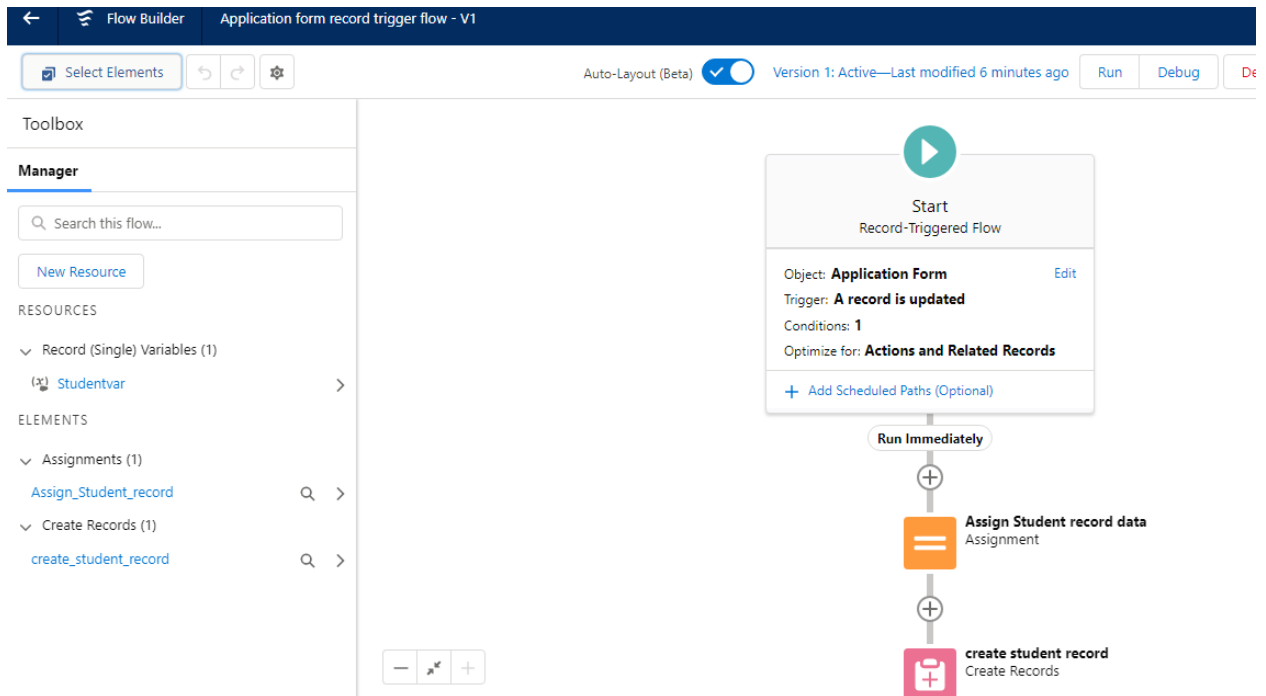
Welcome to CIT

Your College Fee is \$200,000.00.

Regards,

System Administrator

Creating Flow using flow builder:



A student record is automatically created once the ready to join is checked at application form

The screenshot shows the "Application Form" details page for form F-000009. The "Related" tab is active, displaying a list of related student records. The list shows one student named "vinayak". A "New" button is visible in the top right corner of the list. A "View All" link is located at the bottom of the list.

Student Name
vinayak