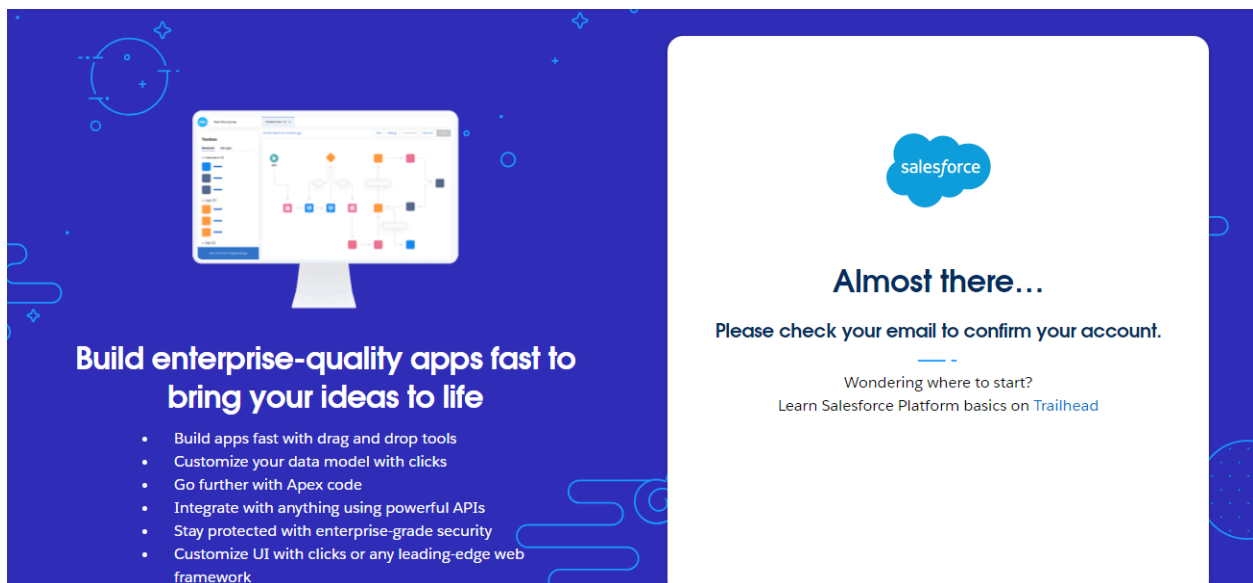Day 1 :

Topic: Create Salesforce Developer Organization

Milestone/Activities:

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

ScreenShots:

Salesforce Account Created:
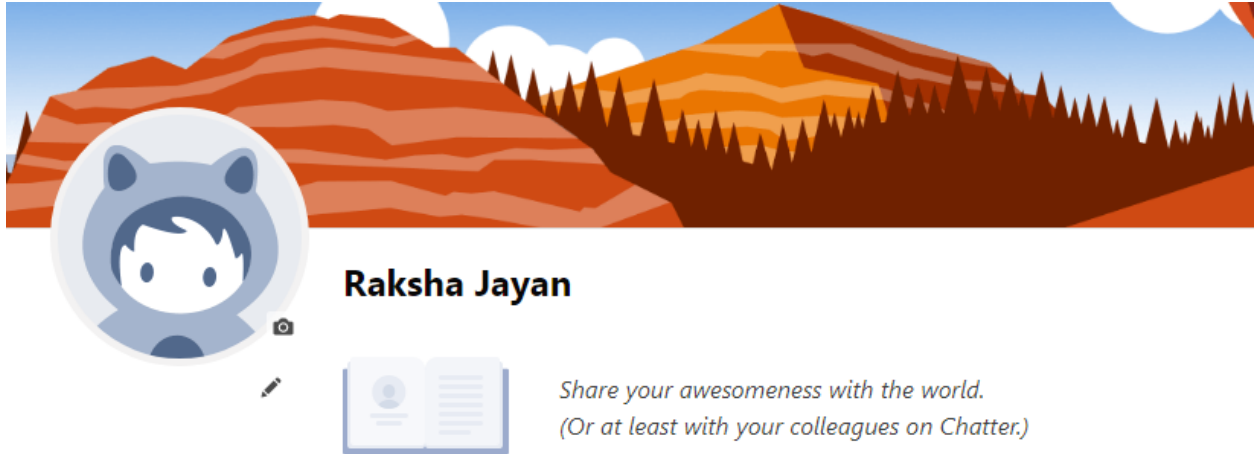
Day 2:

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 -

college

Details

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:

Application Form

Details

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

Enable Reports

Track Activities

Track Field History

Deployment Status

3)Student

Student

Details

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

Enable Reports

Track Activities

Track Field History

4) Subject:

Subject

Details	**Details**
Fields & Relationships	
Page Layouts	Description
Lightning Record Pages	
Buttons, Links, and Actions	API Name
Compact Layouts	Subject__c
Field Sets	Custom
Object Limits	✓

Enable Reports	
Track Activities	
Singular Label	Track Field History
Subject	
Plural Label	Deployment Status
Subjects	Deployed

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

college

Details	**Fields & Relationships**
Fields & Relationships	9 Items, Sorted by Field Label
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	

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)		✓	

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

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	INDEX
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)		✓

SETUP > OBJECT MANAGER
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		✓	▼

SETUP > OBJECT MANAGER
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 dependies
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   Edit   Delete

▼ 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	☐	Assigned dynamically	Raksha Jayan, 1/5/2022, 2:15 AM
Edit	Del	Deactivate	CIT	CIT	☐	Assigned dynamically	Raksha Jayan, 1/5/2022, 2:15 AM
Edit	Del	Deactivate	GCT	GCT	☐	Assigned dynamically	Raksha Jayan, 1/5/2022, 2:15 AM
Edit	Del	Deactivate	IIT-Chennai	IIT-Chennai	☐	Assigned dynamically	Raksha Jayan, 1/5/2022, 2:15 AM
Edit	Del	Deactivate	MIT- BLR	MIT- BLR	☐	Assigned dynamically	Raksha Jayan, 1/5/2022, 2:15 AM
Edit	Del	Deactivate	MIT - Delhi	MIT - Delhi	☐	Assigned dynamically	Raksha Jayan, 1/5/2022, 2:15 AM
Edit	Del	Deactivate	PSG	PSG	☐	Assigned dynamically	Raksha Jayan, 1/5/2022, 2:15 AM

global picklist value for Paper 2 field in subject object

Creating Validation Rules
College Validation Rule

Validation Rule for Application Form

Process Builder for Student Object
creates a student record automatically when Ready to join is checked in the Application form Object
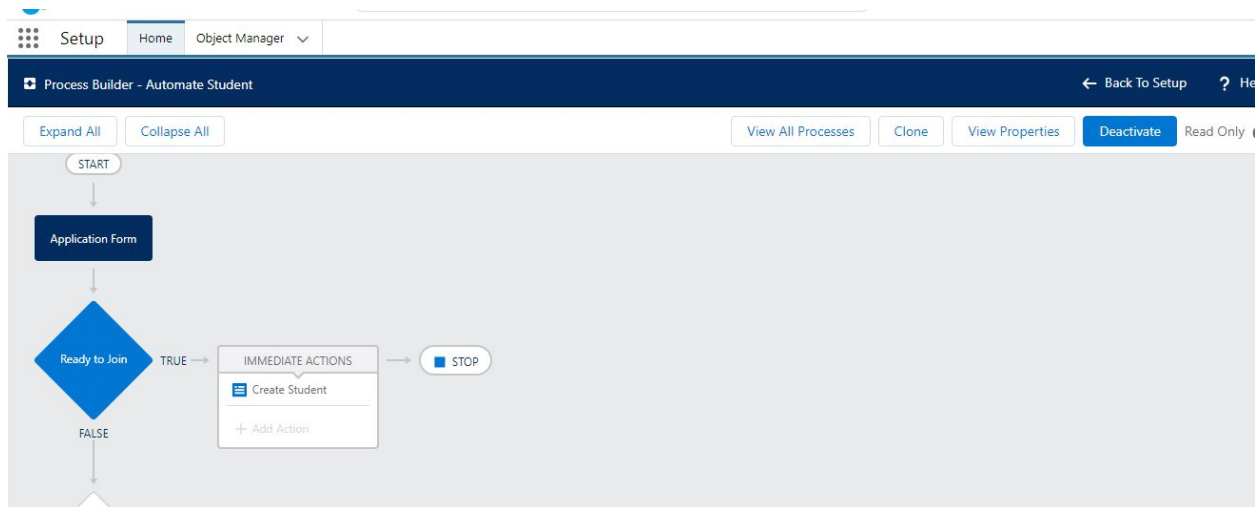
Day 4:

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

Email to Students

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

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	✓
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 ×

Raksha Jayan via h23j300rvozyqr.5j-5hkdeeas.ap27.bnc.salesforce.com
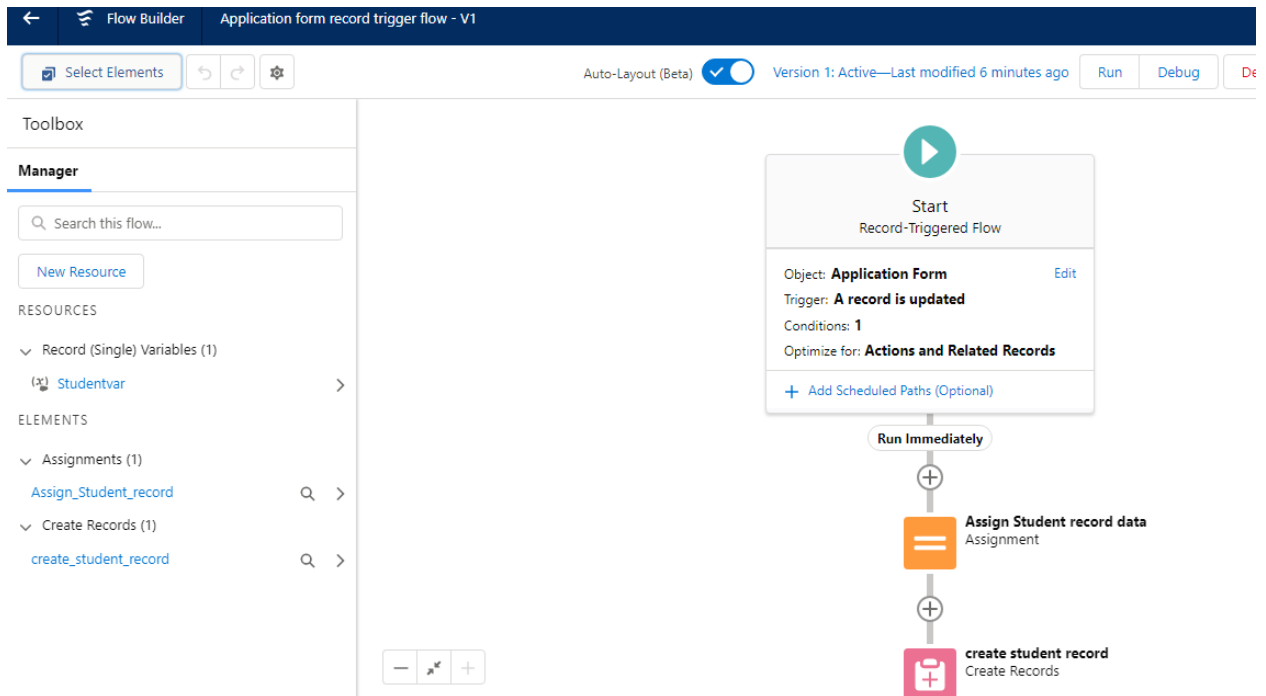to integration@example.com, insightssecurity@example.com, me ▾

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