Phase 2: Salesforce Org Setup & Configuration - Detailed Report

1. Salesforce Developer Edition Signup

- Step: Registered for Salesforce Developer Edition.

- Details Filled:

  - First Name: Sujal

  - Last Name: Patil

  - Job Title: Developer

  - Email: 2004sujalpatil@gmail.com

  - Company: Portfolio Trackrt

  - Country: India

- Outcome: Email verified and Salesforce Developer Org access obtained.

2. Logging into Salesforce Developer Org

- Step: Logged into Salesforce Lightning Experience.

- Outcome: Accessed Setup Dashboard for configuration and customization.

3. Org Setup Exploration

- Step: Explored Setup using the gear icon → Setup.

- Purpose: To understand areas for creating apps, objects, fields, and tabs.

4. Creating the Lightning App

- Step: Created a new Lightning App: Service Request App.

- Details:

  - Navigation Items Added: Home, Cases, Contacts, Accounts, Reports, Dashboards.

  - App Assigned to: System Administrator Profile.

- Outcome: App successfully created and available in App Launcher.

5. Creating Custom Objects & Fields

- Custom Object: Feedback 1

- Fields Created:

- Rating (Picklist: 1-5)

- Comments (Text Area)

- Customer (Lookup to Contact)

- Submitted Date (Date)

- Outcome: Object Feedback created successfully.

6. Creating Tabs for Custom Objects

- Step: Created a tab for Feedback object.

- Purpose: To access the object easily from the app navigation.
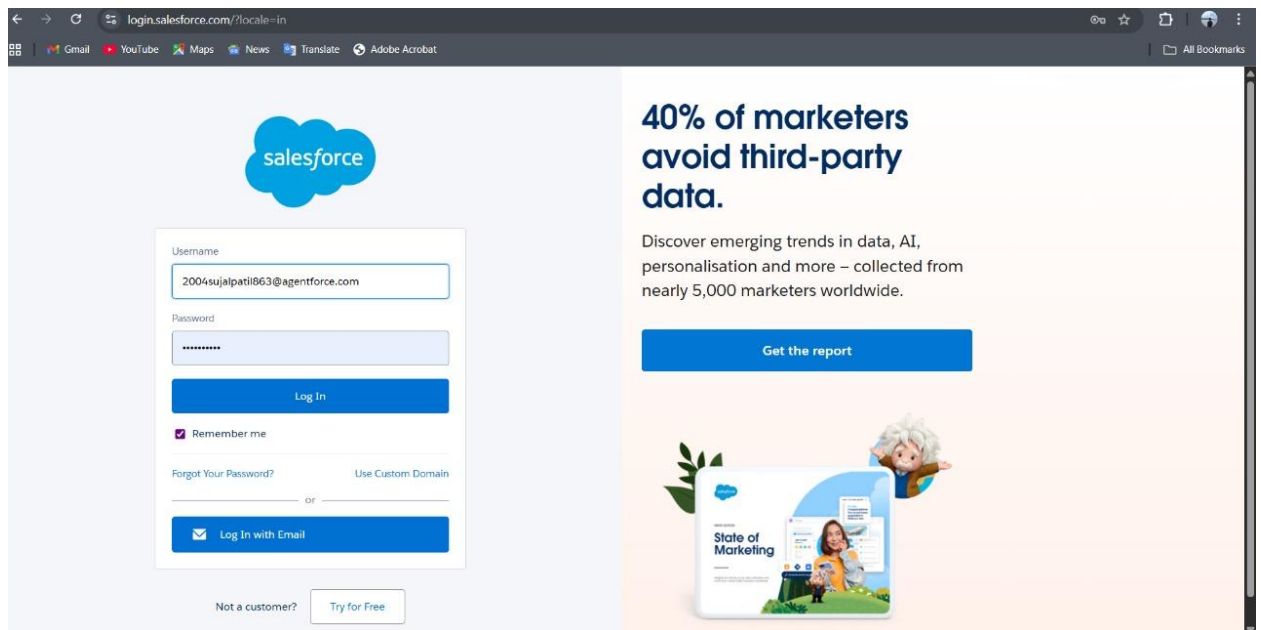
- Outcome: Tab visible in Service Request App.

7. Page Layout Configuration

- Step: Configured Case Page Layout:

    - Added Feedbacks related list.

    - Ensured columns: Rating, Comments, Customer, Submitted Date.

    - Enabled New button for creating Feedback from Case page.

- Outcome: Case page ready to show related Feedbacks.

8. Testing Feedback Related List

- Step: Created a test Case.

    - Filled required Case fields: Subject, Contact.

- Step: Added Feedback to the Case:

    - Rating: 5

    - Comments: Test feedback - good resolution

    - Customer: Selected Contact

- Outcome: Feedback successfully linked to Case. Related list updated.

Portfolio Tracker   Portfolios ⌄   Holdings ⌄   Price Snapshots ⌄   Dashboards ⌄   Reports ⌄

🔍 Search...

Portfolios
Recently Viewed ⌄ 📌

New   Import   Change Owner   Assign Label

0 items • Updated a minute ago

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Nothing to see here

There's nothing in your list yet. Try adding a new record.

←   🖿 Lightning App Builder   ⚙ App Settings   🗎 Pages ⌄   Portfolio Tracker   ? Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

User Profiles

Choose the user profiles that can access this app.

Available Profiles

🔍 Type to filter list...

| Analytics Cloud Integration User |
| Analytics Cloud Security User |
| Anypoint Integration |
| Authenticated Website |
| Authenticated Website |
| B2B Reordering Portal Buyer Profile |
| Contract Manager |
| Custom: Marketing Profile |
| Custom: Sales Profile |
| Custom: Support Profile |

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Selected Profiles

| System Administrator |
| Standard User |
| Portfolio Viewer |
| Portfolio Admin |
| Portfolio Developer |
| Portfolio Tester |

Navigation Items

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

Available Items

- Accounts
- Activation Targets
- Activations
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Categories
- Appointment Invitations
- Approval Requests

Selected Items

- Portfolios
- Holdings
- Price Snapshots
- Dashboards
- Reports

SETUP
Tabs

Custom Tabs

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

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

Custom Object Tabs   New   What Is This?

Action	Label	Tab Style		Description
Edit | Del	Holdings		Fan	
Edit | Del	Portfolios		Computer	
Edit | Del	Price Snapshots		Balls	
Edit | Del	Students		Helicopter	

Web Tabs   New   What Is This?

No Web Tabs have been defined

Visualforce Tabs   New   What Is This?