

Project title : College management application

Day 1 :

Topic : Introduction about sandbox and In object manager explained fields and relationships

Milestones / Activities :

About sandbox and fields and relationships

Detailed Description :

About Sandbox :

Sandbox - identical copy of your production, metadata, data.

- production org - live data, -> create sandbox
 - Certain type of sandbox is given below
1. Developer Sandbox
 2. Developer Pro sandbox
 3. Partial copy sandbox
 4. Full copy sandbox

One by one I explained given below :

1- Developer sandbox -

Identical copy of production it doesn't hold any live data. data space - 200mB refresh interval 1 time in a day

2- Developer Pro sandbox -

Data size 1GB, it is designed for a group of developers. developer, testing, and integration testing as well refresh interval - 1 time in a day

3- Partial copy sandbox -

This copies your configuration and some (not all) of your data, so you can test new configurations with your own real data. Unlike a Full Sandbox, which copies all of your data and is a complete clone of your production organization, a Partial Copy Sandbox only copies a selection of your data.

datasize - 5gb each object can hold 10,000 records refresh interval - 1 time in every

days. bulk load, UAT environment

4- Full copy sandbox -

exact copy of your production environment

datasize - similar as production. refresh interval - 1 time in every 29 days

Object manager :

In this object manager having some of the objects. The object is named as records and its each record is associated with objects. Like Account, Opportunity, Contact etc..

In the object manager having two types of objects -

- Custom object
- Standard object

The custom object is objects that you create to store information that's specific to your company or industry.

The Standard object is objects already created for you by the Salesforce platform.

In the object manager having some field and relationships :

Fields are an integral part of record creation. They are used to store different attributes of the same object or an entity.

Relationship to explain the relation between objects

The detailed explanation is given below

There are majorly two categories of fields in Salesforce. Firstly we have Standard Fields which are prebuilt in salesforce. Even though we have the privilege of editing this field but in no way it can be delete. Next, let's also have a look at Custom Fields. These fields are defined by us i.e. the user which can either be used to extend the functionality of a standard object or add fields to our custom objects.

Field Creation :

The first step at field creation involves selection of its data type. It tells us about the kind of information the field stores. Some of the common data types we might run into includes Checkbox, Date, Text, Number etc.

Unique Fields: Fields can be made unique which would impose no duplicate records to be entered. For example an email field.

Required fields: This field makes it mandatory for a value to be added at record creation. It can't be null. For example: Phone number.

External ID: Used to identify the records uniquely from the external system. For example while importing data from excel sheet to salesforce this field comes in handy.

The table below lets us know about the types of fields we will come across in Salesforce.

FIELD TYPE	DESCRIPTION
Identity	Case-sensitive, 15 character field which gets generated for every record. Example: 50130000000014c
System	Read-only fields which give information about a record from the system. Example: CreatedDate, LastModifiedById, LastModifiedDate.
Name	Text names or auto-numbered names which increment upon record creation. This field is required.
Custom	Users created fields on either standard or custom objects.

Overview of Field level security : Field level security in salesforce controls visibility, accessibility and manipulation for a particular field on an object. It can be applied to multiple fields on a single profile or permission set and can also be applied to a single field on all profiles.

Field Dependencies : They are the filters which allow us to change the contents of a picklist based on the value of another field. City and state is a good example of field dependency where city will be the dependent field and state will be the controlling field.

Relationships : Similar to the concept of relationships that we studied in RDBMS which was introduced to remove data inconsistency and data redundancy, Salesforce also provides us the same concept which can be implemented using Relationship fields.

The certain relationships is given below

1. Lookup relationship
2. Master details relationships
3. Self relationship
4. Many to many relationship
5. Indirect relationship

Lookup relationship : These share weak association among the two associated objects.

Master detail Relationship : It represents a strong relationship between a master and a detail object. Detail records cannot exist without a master record. Detailed objects inherit the security and sharing settings of master objects. Example: Multiple Employees can be associated with a company

Self relationship : When an object has a lookup with itself, it is a self-relationship. A self relationship creates a tree diagram of the objects. For example, the account has a lookup on himself, called Parent Account.

Many to many relationship : Using a custom junction object, you can model a “many-to-many” relationship between two objects. For example, you create a custom object called “Bug” that relates to the standard case object such that a bug could be related to multiple cases and a case could also be related to multiple bugs.

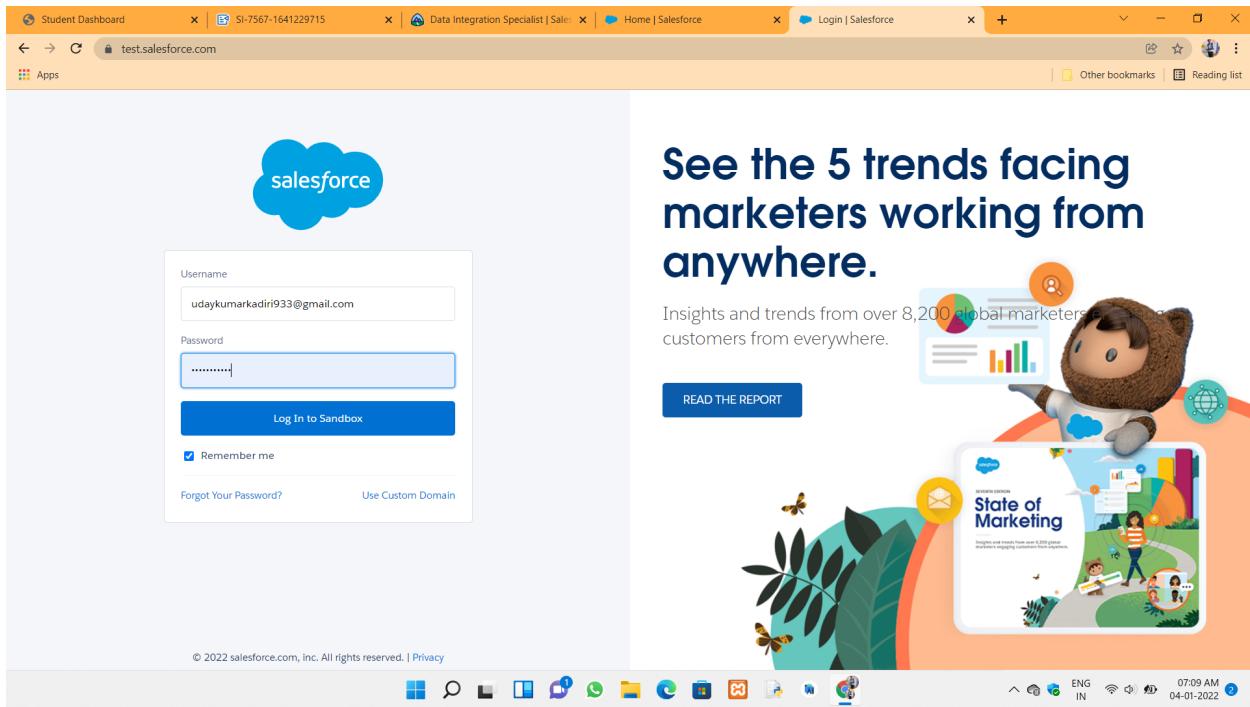
Indirect relationship : It is a new field type introduced with Salesforce Connect. It links an external object to a standard or custom object in the same way that a regular lookup relationship links standard or custom objects.

Overview of Field level security :

Field level security in salesforce controls visibility, accessibility and manipulation for a particular field on an object. It can be applied to multiple fields on a single profile or permission set and can also be applied to a single field on all profiles.

Snapshots of the Milestone and Activities :

sandboxes selection and its environment :



object manager types :

Custom object:

The screenshot shows the Salesforce Setup interface with the title 'New Custom Object'. The page includes fields for 'Label' (Account), 'Plural Label' (Accounts), 'Object Name' (Account), and a 'Description' section. A note at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles.' Buttons for 'Save' and 'Save & New' are visible. The status bar at the bottom right shows '07:13 AM 04-01-2022'.

Standard object :

The screenshot shows the Salesforce Setup interface with the title 'Account'. The left sidebar lists various object settings like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main 'Details' section shows standard object metadata such as API Name (Account), Singular Label (Account), and Plural Label (Accounts). The status bar at the bottom right shows '07:14 AM 04-01-2022'.

Fields and relationships in salesforce page :

Custom fields :

The screenshot shows the Salesforce Setup interface with the following details:

- Tab:** Object Manager > Account
- Section:** Fields & Relationships
- Wizard Step:** Step 1. Choose the field type
- Section:** Data Type
- Options:**
 - None Selected
 - Auto Number
 - Formula
 - Roll-Up Summary
 - Lookup Relationship
 - External Lookup Relationship
 - Checkbox
 - Currency
 - Date
 - Data/Time
 - Email
 - Geolocation
 - Number
 - Percent
 - Phone
 - URL
- Help:** Help for this Page
- Buttons:** Next | Cancel

Relationships :

The screenshot shows the Salesforce Setup interface with the following details:

- Tab:** Object Manager > Account
- Section:** Fields & Relationships
- Wizard Step:** Step 1. Choose the field type
- Section:** Data Type
- Options:**
 - None Selected
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 - Checkbox
 - Currency
 - Date
 - Data/Time
 - Email
 - Geolocation
 - Number
 - Percent
 - Phone
 - URL

A red circle highlights the "Lookup Relationship" option. A red oval highlights the description text below it: "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."

Day 2 :

Topic : Created developer account and log in to the my organization and Create the college management application and its attributes

Milestones / activities : App manager through create the college management application. Object creation and field creation and validation rules and page layouts added into the college management application.

Detailed Description :

App manager : It shows all your connected apps and Salesforce apps. Use the Lightning Experience App Manager to: View all your Salesforce apps.

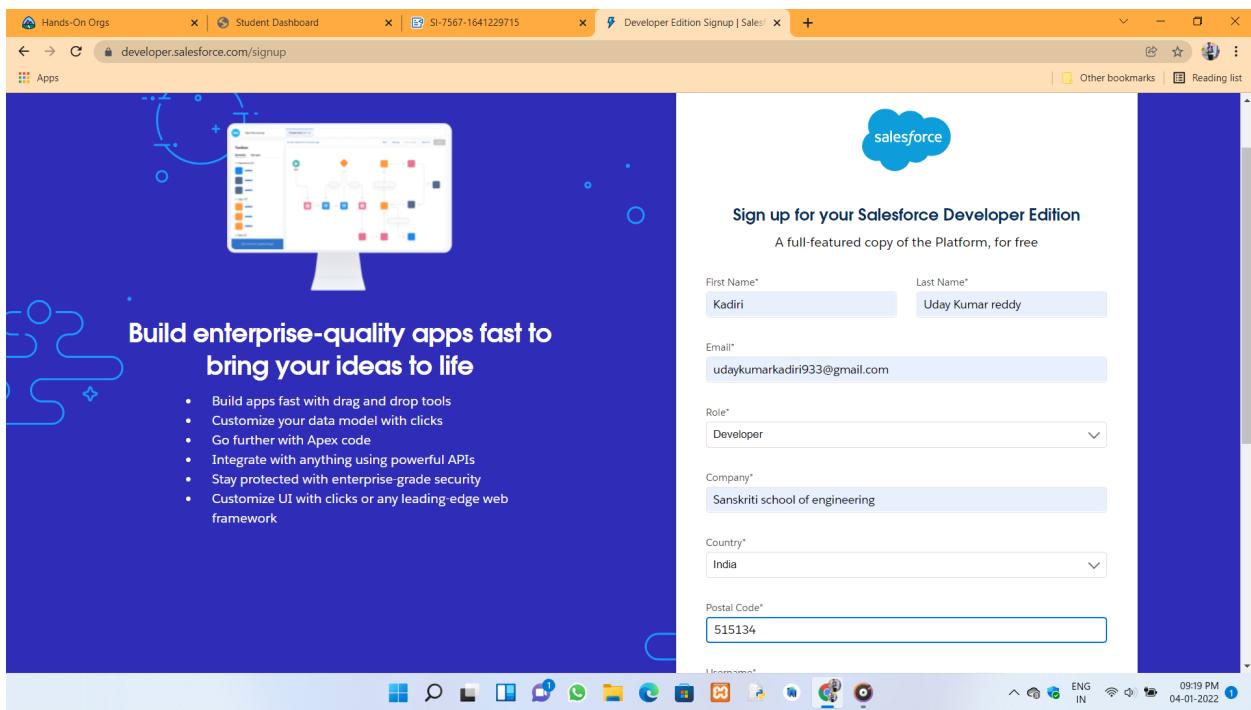
Object creation : To create a custom object, click New Custom Object, enter the name of the Custom Object in Label, Plural Label, and Object Name.

Field creation : A field is like a custom Database column. Object field Store the data for our records. Salesforce by default provide few fields with salesforce standard objects those are called standard fields. We cannot delete salesforce standard field. If we want we can change label name. The field created by us are called Custom field. We can delete a custom field in Salesforce.

Validation rules : Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. A validation rule can contain a formula or expression that evaluates the data in one or more fields and returns a value of "True" or "False".

Snapshots of the Milestone and Activities :

Creating Developer account in salesforce :



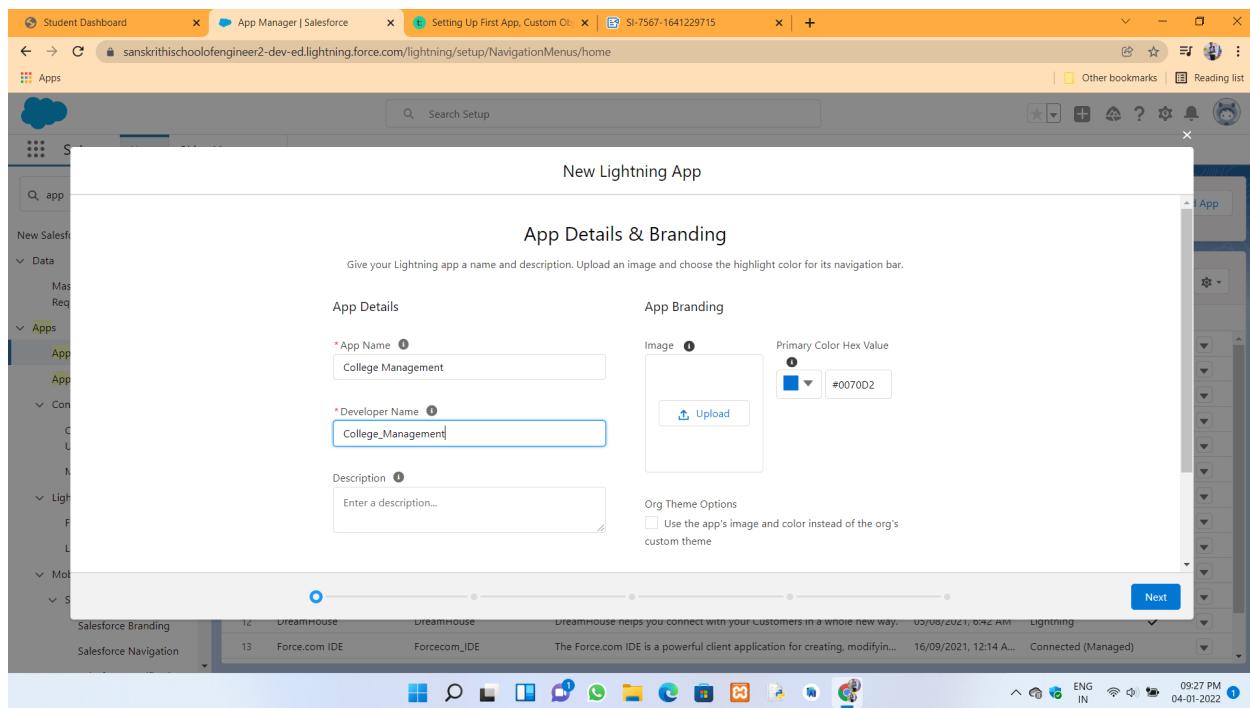
My organization :

The screenshot shows the Trailhead App Manager interface. It displays four org profiles in cards:

- Product**
 - Username: brave-unicorn-hthar3.com
 - Type: Trailhead Playground
 - Created: 8/4/2021
 - Last Activity: Create a Hello World Lightning Web Component on 11/16/2021
- Sample data**
 - Username: playful-koala-dh66dl.com
 - Type: Trailhead Playground
 - Created: 8/4/2021
 - Last Activity: Create a Hello World Lightning Web Component on 11/16/2021
- Developer Edition** (LAST USED)
 - Username: udaykumarkadir933@gmail.com
 - Type: Developer Edition
 - Connected: 8/4/2021
 - Last Activity: Create Report and Dashboard Folders on 1/3/2022
- Contact**
 - Username: empathetic-wolf-gn9smn.com
 - Type: Trailhead Playground
 - Created: 8/4/2021
 - Last Activity: Create Report and Dashboard Folders on 1/3/2022

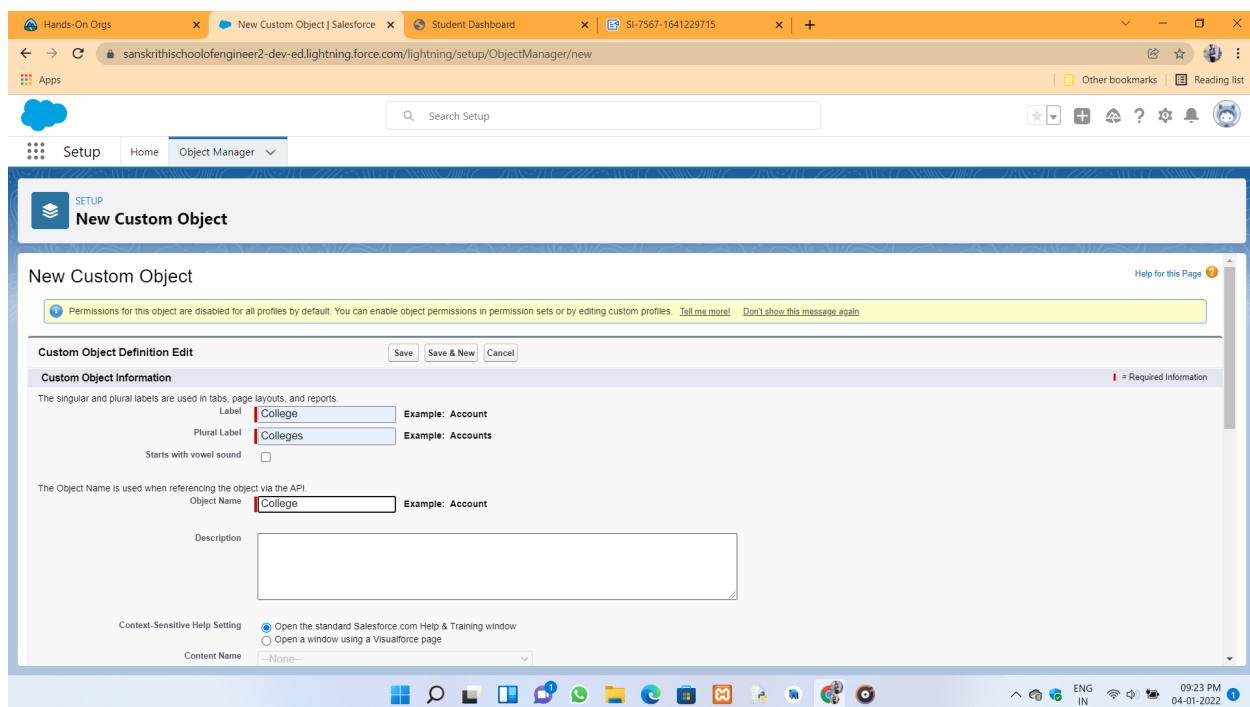
A red oval highlights the "Developer Edition" card. At the bottom right, there are system status icons and the date/time: 08:36 PM 04-01-2022.

App manager to create College management application :



Custom objects to create in the College management :

College object



Application form object :

The screenshot shows the Salesforce Setup interface with the following details:

- Custom Object Definition Edit** screen.
- Custom Object Information** section:
 - Label: Application Form (Example: Account)
 - Plural Label: Application Forms (Example: Accounts)
 - Starts with vowel sound:
 - Object Name: Application_Form (Example: Account)
 - Description: (Empty text area)
- Context-Sensitive Help Setting**:
 - Open the standard Salesforce.com Help & Training window (radio button selected)
 - Open a window using a Visualforce page
- Content Name**: None

Student object in application form and application form object:

The screenshot shows the Salesforce Setup interface with the following details:

- SETUP > OBJECT MANAGER** screen.
- Application Form** object.
- New Custom Field** screen (Step 2 of 4):
 - Field Label**: Student Name
 - Length**: 30
 - Field Name**: Student_Name
 - Description**: (Empty text area)
 - Help Text**: (Empty text area)
 - Required**: Always require a value in this field in order to save a record
 - Unique**: Do not allow duplicate values
 - Treat "ABC" and "abc" as duplicate values (case insensitive)
 - Treat "ABC" and "abc" as different values (case sensitive)
 - External ID**: Set this field as the unique record identifier from an external system

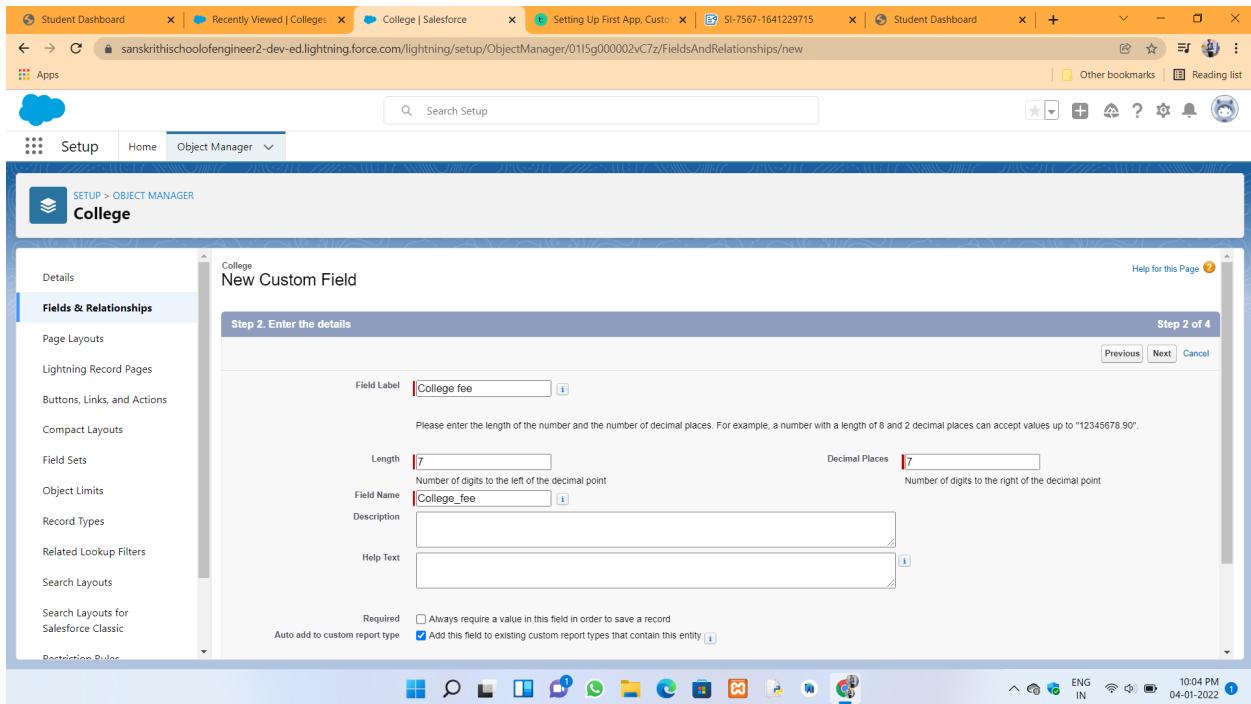
Date of Birth in Application form object :

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' under 'Object Manager'. The main panel is titled 'Application Form New Custom Field' and is on 'Step 2 Enter the details'. The field label is 'Date of Birth', field name is 'Date_of_Birth', and it is marked as required. The help text is empty. The default value is set to 'Show Formula Editor' with a note about formula syntax. The 'Auto add to custom report type' checkbox is checked. The status bar at the bottom shows the date as 04-01-2022 and time as 10:41 PM.

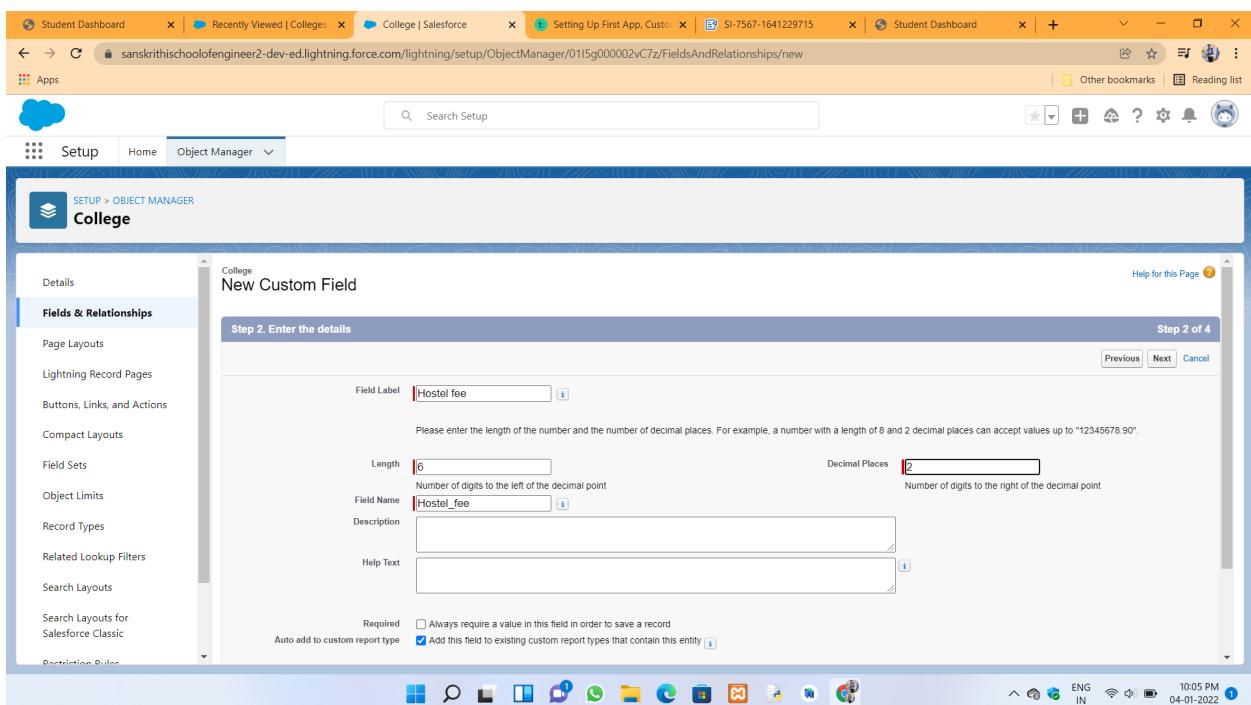
Record info field in College object and application form object:

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' under 'Object Manager'. The main panel is titled 'College New Custom Field' and is on 'Step 2 Enter the details'. The field label is 'Record info', length is set to 10, field name is 'Record_info', and it is marked as required. The help text is empty. The status bar at the bottom shows the date as 04-01-2022 and time as 10:55 PM.

College fees field in College object and application form object:



Hostel fees field in College object and application form object:



College Name Picklist in College object and application form object :

The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'Objects and Fields', 'Picklist Value Sets' is selected. In the main area, a 'Global Value Set' is being edited. The 'Label' field is set to 'College Name'. The 'Name' field contains 'College_Name'. The 'Values' section lists several entries: 'MIT - HYD', 'MIT - MAA', 'MIT - BLR', 'MIT - TLL', 'MIT - MUM', and 'MIT - CCU'. There are two checkboxes at the bottom of the values list: 'Display values alphabetically, not in the order entered' (unchecked) and 'Use first value as default value' (unchecked). The top right corner of the window shows 'Help for this Page' and a 'Required Information' indicator.

College Email picklist in College object and application form object:

The screenshot shows the Salesforce Setup interface. On the left sidebar, under 'Fields & Relationships', 'New Custom Field' is selected for the 'College' object. In the main area, 'Step 2. Enter the details' is displayed. The 'Field Label' is set to 'College Email'. The 'Values' section has a radio button selected for 'Enter values, with each value separated by a new line'. Below this, a text area lists several email addresses: 'mit@hyd.com', 'mit@blr.com', 'mit@ccu.com', 'mit@maa.com', 'mit@mum.com', and 'mit@dei.com'. At the bottom of the values list, there are three checkboxes: 'Display values alphabetically, not in the order entered' (unchecked), 'Use first value as default value' (unchecked), and 'Restrict picklist to the values defined in the value set'. The 'Field Name' is set to 'College_Email'. The top right corner of the window shows 'Help for this Page' and a 'Step 2 of 4' indicator.

Capacity of students in college picklist in College object :

The screenshot shows the Salesforce Setup interface for the 'College' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area displays the 'Custom Field Definition Detail' for the 'No of Seats' field. The field label is 'No of Seats'. The object name is 'College' and the data type is 'Picklist'. The field name is 'No_of_Seats' and the API name is 'No_of_Seats__c'. The description is 'No of Seats'. The field usage is 'Data Owner'. The field sensitivity level is 'Data Sensitivity Level'. The compliance categorization is 'Created By' and 'Modified By', both set to 'Kadiri Uday Kumar reddy'. The general options show 'Required' is unchecked and 'Default Value' is set to '1'. Under 'Picklist Options', it says 'Restrict picklist to the values defined in' with a dropdown menu open. The status bar at the bottom indicates it's 11:05 PM on 04-01-2022.

Field dependencies between College name and college email :

The screenshot shows the Salesforce Setup interface for creating a validation rule for the 'College' object. The sidebar lists various setup categories. The main area is titled 'College Validation Rule' and defines a validation rule by specifying an error condition and a corresponding error message. The error condition formula is 'Name <> TEXT(College_Name__c)'. The validation rule edit screen shows 'Rule Name' as 'College_Name_Similar', 'Active' checked, and an empty 'Description' field. A 'Quick Tips' box is visible with 'Operators & Functions' listed. The status bar at the bottom indicates it's 10:27 PM on 04-01-2022.

Field dependencies between college name and capacity of students :

The screenshot shows the Salesforce Setup interface for the 'College' object. The 'Fields & Relationships' tab is selected. A grid displays 'Controlling Field' (College Name) and 'Dependent Field' (No of Seats). Below the grid, instructions explain how to manage visibility using 'Include Values' and 'Exclude Values' buttons. A legend indicates that yellow cells represent 'Included Value' and white cells represent 'Excluded Value'. The URL in the browser bar is: <https://sanskritischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115g000002vC7z/FieldsAndRelationships/editDependency?controller=00N5g00000RsNoN&dependent=...>

College management application overview all things :

The screenshot shows the 'College Management' application interface. The 'Colleges' tab is selected. A table lists one item: 'mit' with 'Record ID' a0N5g000000Vj0EAE', 'College fee' '\$50,000.0000000', 'College Name' 'mit', and 'Hostel fee' '\$70,000.00'. The URL in the browser bar is: https://sanskritischoolofengineer2-dev-ed.lightning.force.com/lightning/o/College_c/list?filterName=00B5g00000WMKtYEAX

Student Dashboard | New College | Salesforce | College | Salesforce | Setting Up First App. | SI-7567-1641229715 | Student Dashboard | SI-7567-1641229715 | + | - | X

[sanskrthischoolengineer2-dev-ed.lightning.force.com/lightning/o/College__c/new?count=4&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=16413189260978724...](#)

Other bookmarks | Reading list

Apps

College Management Accounts

All Colleges

1 item • Sorted by Record ID • Filtered by All colleges • Updated 1 hour ago

Record ID ↑

1 a0N5g000000vYj0EAE

New College

Information

*College Name

Owner Kadiri Uday Kumar reddy

*College Name

College fee

View all dependencies

College Email

Hostel fee

View all dependencies

No of Seats

View all dependencies

System Information

Record info

Cancel Save & New Save

Student Dashboard | New Application Form | College | Salesforce | Setting Up First App. | SI-7567-1641229715 | Student Dashboard | SI-7567-1641229715 | + | - | X

[sanskrthischoolengineer2-dev-ed.lightning.force.com/lightning/o/Application_Form__c/new?count=5&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=164131894...](#)

Other bookmarks | Reading list

Apps

College Management Accounts Contacts Colleges Application Forms

Application Forms Recently Viewed

0 items • Updated a few seconds ago

Form Number

Information

*College Search Colleges...

Student Name

*Email

Date of Birth

New Import

Cancel Save & New Save