



Salesforce Project Ready

Entry level Training & Professional Development Program

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

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 interpretation testing as well refresh interval - 1 time in a day

3- Partial copy sandbox -

This is 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.

datasets - 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

datasets - 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 cant 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.



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 :



A screenshot of a web browser showing the Salesforce login page and a marketing report. The browser has multiple tabs open, including 'Student Dashboard', 'SI-7567-1641229715', 'Data Integration Specialist | Sale...', 'Home | Salesforce', and 'Login | Salesforce'. The main content area shows the Salesforce login form with fields for 'Username' (udaykumarkadir933@gmail.com) and 'Password', and options for 'Log In to Sandbox', 'Remember me', and links for 'Forgot Your Password?' and 'Use Custom Domain'. To the right of the login form is a promotional graphic for a marketing report titled 'State of Marketing'. The graphic features a cartoon character, a globe, and various icons related to marketing and technology. A call-to-action button says 'READ THE REPORT'. At the bottom of the screen, the Windows taskbar is visible with various pinned icons and system status indicators.

object manager types :

Custom object:

Standard object :

A screenshot of a Microsoft Edge browser window showing the Salesforce Object Manager. The URL is "sanskrithischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/Details/view". The page title is "Object Manager - Account". The left sidebar shows navigation options like "Fields & Relationships", "Page Layouts", "Lightning Record Pages", etc. The main content area displays the "Details" section for the Account object, listing fields such as API Name (Account), Singular Label (Account), Plural Label (Accounts), and various settings like Enable Reports, Track Activities, Track Field History, Deployment Status, and Help Settings (Standard salesforce.com Help Window).

Student Dashboard | SI-7567-1641229715 | Data Integration Specialist | Sales | Account | Salesforce | Login | Salesforce

sanskrithischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/Details/view

Other bookmarks | Reading list

Apps

Setup | Home | Object Manager

Search Setup

SETUP > OBJECT MANAGER

Account

Details

Description

API Name
Account

Enable Reports

Custom

Track Activities

Singular Label
Account

Track Field History

Plural Label
Accounts

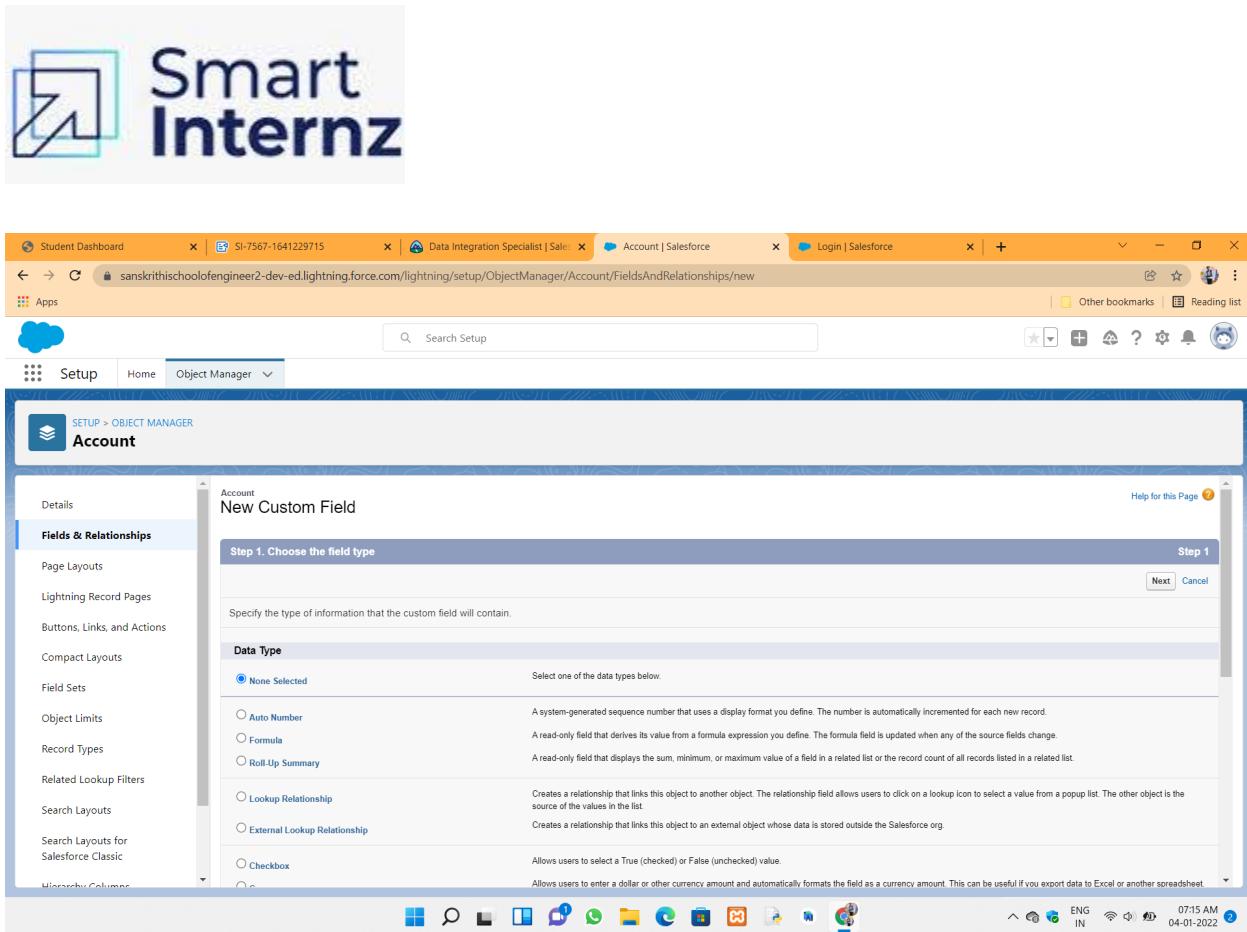
Deployment Status

Help Settings
Standard salesforce.com Help Window

07:14 AM 04-01-2022

Fields and relationships in salesforce page :

Custom fields :



Relationships :



Screenshot of the Salesforce Setup interface showing the creation of a new field for the Account object.

The page title is "Setup > OBJECT MANAGER Account".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area displays a list of data types:

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- URL

Annotations:

- A red circle highlights the "Lookup Relationship" option.
- A red line connects the "None Selected" option to the "A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record." description.
- A red line connects the "External Lookup Relationship" option to its description: "Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org".
- A red line connects the "None Selected" option to the "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." description.
- A red line connects the "None Selected" option to the "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." description.

Browser tabs at the top include "Student Dashboard", "SI-7567-1641229715", "Data Integration Specialist | Sale", "Account | Salesforce", and "Login | Salesforce".

System status bar at the bottom right shows "07:16 AM 04-01-2022".



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:

App manager is used to for managing apps for Lightning Experience. When you edit a Lightning app from the App Manager in Setup, you're brought into the Lightning App Builder to manage the app's settings. Update app branding, navigation, and other options, and manage the Lightning pages assigned to that app all in one place.

Setting First App:

To setup a default app per profile we should follow the instructions that I have given below:

1. From Setup, enter App manager in the Quick Find box, then select App manager
2. Select a New lightning app at the top of the page.
3. An empty new lightning app page is displayed.
4. Enter Corresponding details in that page as per user requirements and click save and next.
5. App options page will displayed and enter corresponding details and click next.
6. Now add navigation items and user profiles as per requirements and click next.
7. click Save.

Custom Object creation:

The custom object is an object that which we create to store an information specific to user requirements.

To create custom object follow the instructions that I have shown below:

1. Click on object manager in setup page.
2. On the top of the page we will see that create menu so that we can create custom object as per requirements
3. click save

Create custom Tabs:

1. From Setup, enter Tabs in the Quick Find box, then select Tabs.
2. A Tabs page is displayed.
3. Now click new button near create custom tab so that custom tab will be created
4. Now create a tab with respective object and select Tab style in requirements
5. click next and save

Now college Tab will be set in College management application. So that you will be create new fields in that college.

Picklist value sets:

Picklist value sets are used to finds all the values in the database for the Industry field or any other object.

To Create picklist value sets follow the instructions given below:

1. From Quick find box, search picklist value sets and click on it
2. Open custom picklist value sets in that page
3. Enter a label for the global value set. This name appears in Setup, and when users create a picklist based on this global value set.
4. To tell users what these values are for, enter a specific description of the global value set. This text appears on the Picklist Value Sets list page in Setup.
5. Enter the values, one per line.
6. Optionally choose to sort the values alphabetically or to use the first value in the list as the default value, or both.
7. Click Save.

Field Creation:

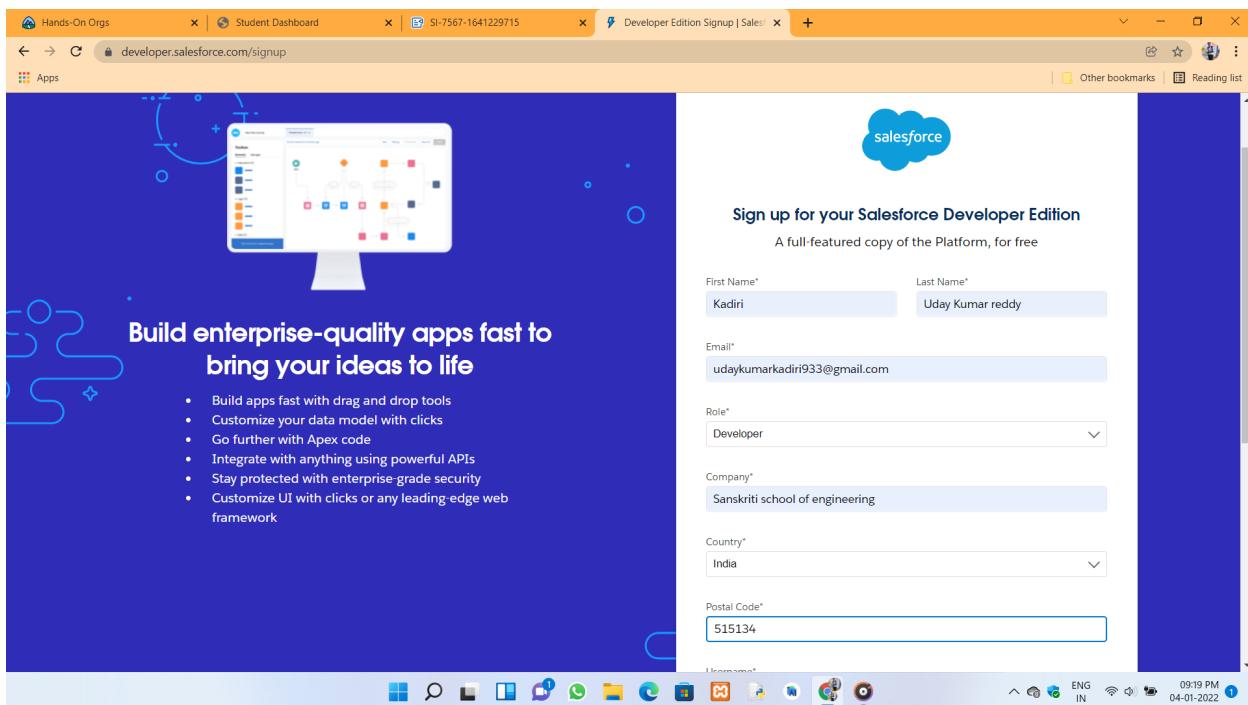
We can create Many fields in every object. To create fields we have to follow the steps given below.

1. Open object manager and click particular object where you have to create fields.
2. Click Fields and relationships in that object.
3. Click on "New" to create new fields
4. Enter corresponding details regarding to that and click next
5. click save

Now that field is successfully created

Snapshots of the Milestone and Activities :

Creating Developer account in salesforce :



My organization :



Screenshot of a web browser showing the Salesforce App Manager interface. The URL is trailhead.salesforce.com/en/users/profiles/orgs. The page displays a list of org profiles:

- 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

The "Developer Edition" entry is circled in red. The browser taskbar at the bottom shows various pinned icons and the system tray indicates the date and time as 04-01-2022 08:36 PM.

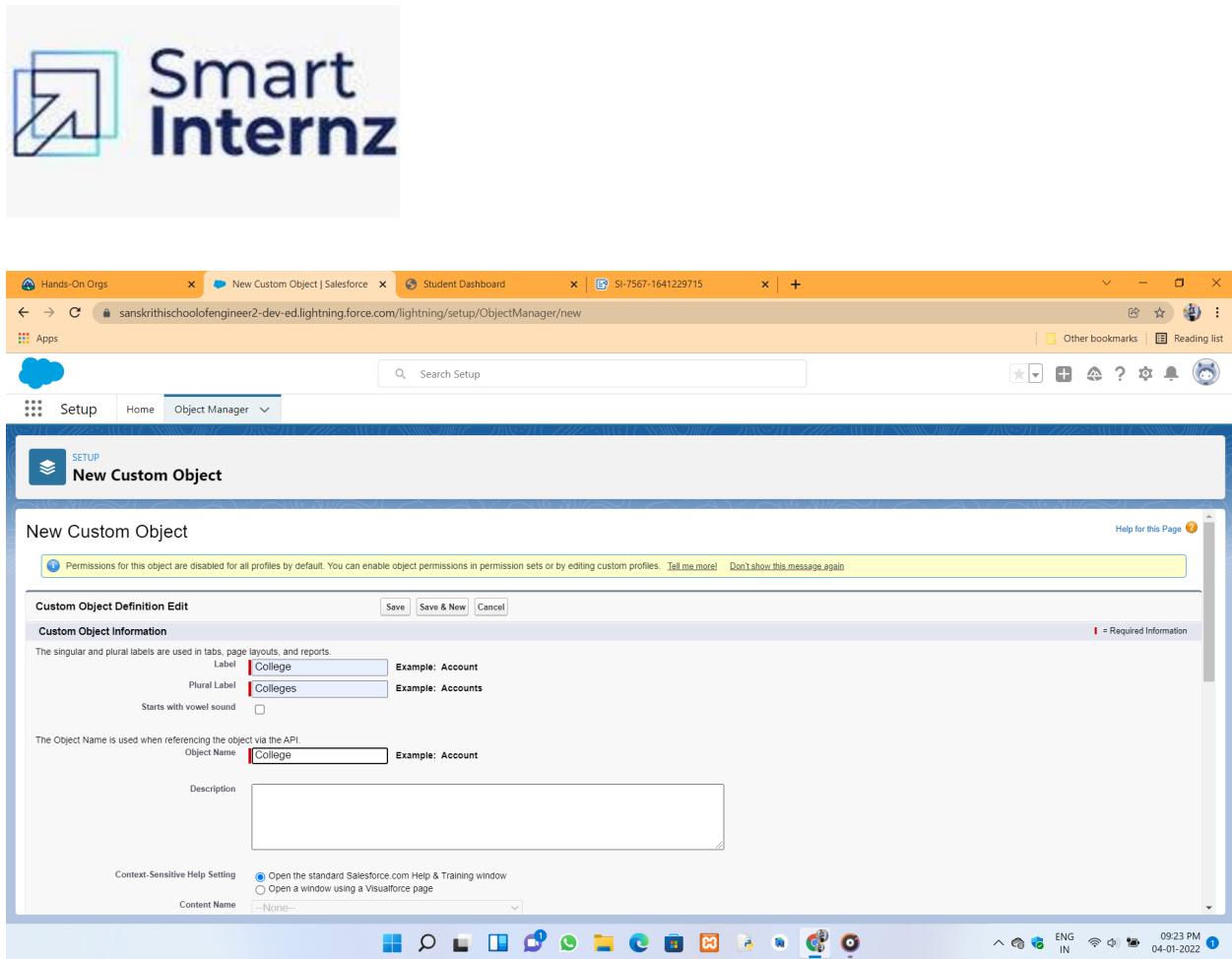
App manager to create College management application :



A screenshot of a web browser window showing the Salesforce App Manager. The title bar shows multiple tabs: "Student Dashboard", "App Manager | Salesforce", "Setting Up First App: Custom Obj...", and "SI-7567-1641229715". The main content area is titled "New Lightning App" and "App Details & Branding". On the left, there's a sidebar with "New Salesforce" and "Data" sections, and a "Apps" section which is expanded to show "App Name" and "Developer Name" fields. The "App Name" field contains "College Management" and the "Developer Name" field contains "College_Management". To the right, there's an "App Branding" section with "Image" and "Primary Color Hex Value" fields. The "Image" field has a placeholder "Upload" button and a color swatch set to "#0070D2". Below it is an "Org Theme Options" section with a checkbox for "Use the app's image and color instead of the org's custom theme". At the bottom of the dialog, there's a progress bar with steps 12, 13, and 14, and a "Next" button. The status bar at the bottom of the browser window shows "09:27 PM 04-01-2022".

Custom objects to create in the College management :

College object



Application form object :



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

- Page Header:** Student Dashboard, New Custom Object | Salesforce, Setting Up First App. Custom Obj, SI-7567-1641229715, Student Dashboard.
- Search Bar:** Search Setup
- Breadcrumbs:** Apps > Setup > Home > Object Manager
- Section:** SETUP > New Custom Object
- Form Fields (Custom Object Definition Edit):**
 - Custom Object Information:** Label: Application Form (highlighted), Example: Account; Plural Label: Application Forms (highlighted), Example: Accounts; Starts with vowel sound:
 - Object Name:** Object Name: Application_Form (highlighted), Example: Account
 - Description:** 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
- Buttons:** Save, Save & New, Cancel
- Help:** Help for this Page
- System Status:** ENG IN, 09:33 PM, 04-01-2022

Student object in application form and application form object:



The screenshot shows the Salesforce Setup interface. The left sidebar is titled "SETUP > OBJECT MANAGER" and lists various options under "Fields & Relationships". The main area is titled "Application Form New Custom Field" and "Step 2. Enter the details". The "Field Label" is set to "Student Name", "Length" is 30, and "Field Name" is "Student_Name". The "Description" and "Help Text" fields are empty. Under "Required", there are three radio button options: "Always require a value in this field in order to save a record" (unchecked), "Do not allow duplicate values" (unchecked), and "Treat 'ABC' and 'abc' as duplicate values (case insensitive)" (checked). Under "Unique", there are two radio button options: "Treat 'ABC' and 'abc' as different values (case sensitive)" (unchecked) and "Treat 'ABC' and 'abc' as duplicate values (case insensitive)" (checked). Under "External ID", there is an unchecked checkbox for "Set this field as the unique record identifier from an external system". The top navigation bar shows multiple tabs open, including "Student Dashboard", "Recently Viewed", "Application Form | Salesfor...", "Setting Up First App. Cust...", and "SI-7567-1641229715". The bottom status bar shows the date and time as "04-01-2022 10:39 PM".

Date of Birth in Application form object :



A screenshot of the Salesforce Setup interface. The title bar shows multiple tabs including "Student Dashboard", "Recently Viewed | Applications", "Application Form | Salesfor...", "Setting Up First App, Cust...", "SI-7567-1641229715", "Student Dashboard", and "Other bookmarks | Reading list". The main area is titled "Application Form" under "SETUP > OBJECT MANAGER". A sidebar on the left lists various setup categories like "Details", "Fields & Relationships", "Page Layouts", etc. The main content area is titled "New Custom Field" and is on "Step 2 of 4". It asks for "Field Label" (Date of Birth), "Field Name" (Date_of_Birth), and "Description". Under "Required", there are two checkboxes: "Always require a value in this field in order to save a record" (unchecked) and "Add this field to existing custom report types that contain this entity" (checked). The "Default Value" section includes a "Show Formula Editor" button and a formula syntax help text. The status bar at the bottom shows "10:41 PM 04-01-2022".

Record info field in College object and application form object:\



The screenshot shows a Windows desktop environment with multiple browser tabs open in a Microsoft Edge window. The active tab is 'Object Manager' for the 'College' object in the 'Setup' section of Salesforce. The page title is 'New Custom Field'. The left sidebar lists various setup categories under 'Fields & Relationships'. The main form is Step 2 of 4, titled 'Enter the details'. It includes fields for 'Field Label' (set to 'Record info'), 'Length' (set to 10), 'Field Name' (set to 'Record_info'), 'Description' (empty), and 'Help Text' (empty). Under 'Required', there is a checkbox for 'Always require a value in this field in order to save a record'. Under 'Unique', there are three options: 'Do not allow duplicate values' (unchecked), 'Treat "ABC" and "abc" as duplicate values (case insensitive)' (checked), and 'Treat "ABC" and "abc" as different values (case sensitive)' (unchecked). A note states 'Please enter the maximum length for a text field below.' The bottom right of the screen shows system status icons and the date/time '04-01-2022 10:55 PM'.

College fees field in College object and application form object:



A screenshot of the Salesforce Setup interface. The top navigation bar shows tabs like "Student Dashboard", "Recently Viewed | Colleges", "College | Salesforce", "Setting Up First App, Cust...", "Sl-7567-1641229715", and "Student Dashboard". Below the bar, there's a toolbar with icons for "Apps", "Search Setup", and various system links. The main content area is titled "College New Custom Field" under "Step 2. Enter the details". The "Field Label" is set to "College fee". The "Length" is set to 7, and "Decimal Places" is also set to 7. The "Field Name" is "College_fee", and the "Description" and "Help Text" fields are empty. Under "Required", there are two checkboxes: one for "Always require a value in this field in order to save a record" (unchecked) and another for "Add this field to existing custom report types that contain this entity" (checked). On the left sidebar, under "Fields & Relationships", other options like "Page Layouts", "Lightning Record Pages", and "Buttons, Links, and Actions" are listed. The bottom of the screen shows the Windows taskbar with various pinned apps and the system tray indicating the date and time as 04-01-2022 at 10:04 PM.

Hostel fees field in College object and application form object:



A screenshot of the Salesforce Setup interface. The title bar shows multiple tabs including "Student Dashboard", "Recently Viewed | Colleges", "College | Salesforce", "Setting Up First App, Cust...", "SI-7567-1641229715", and "Student Dashboard". The main area is titled "College New Custom Field" and "Step 2. Enter the details". The left sidebar lists "Fields & Relationships" and other setup categories like "Page Layouts", "Lightning Record Pages", etc. The right panel contains fields for "Field Label" (Hostel fee), "Length" (6), "Field Name" (Hostel_fee), "Decimal Places" (2), "Description", and "Help Text". There are checkboxes for "Required" and "Auto add to custom report type", with the latter checked. Navigation buttons "Previous", "Next", and "Cancel" are at the top right. The bottom of the screen shows the Windows taskbar with various pinned icons.

College Name Picklist in College object and application form object :



A screenshot of the Salesforce Setup interface. The left sidebar shows navigation paths like Data, Feature Settings, Topics, and Objects and Fields, with 'Picklist Value Sets' selected. The main area is titled 'Picklist Value Sets' and shows a 'Global Value Set Edit' screen for 'College Name'. The 'Information' section includes fields for 'Label' (College Name), 'Name' (College_Name), and 'Description'. The 'Values' section contains a text area with values: MIT - HYD, MIT - MAA, MIT - BLR, MIT - DEL, MIT - MUM, and MIT - CCU. There are checkboxes for 'Display values alphabetically, not in the order entered' and 'Use first value as default value'. The top navigation bar shows multiple tabs open, including 'Recently Viewed', 'Picklist Value Sets', 'Setting Up First App', and 'Student Dashboard'. The bottom status bar shows system information like network connectivity, battery level, and the date/time (04-01-2022, 09:46 PM).

College Email picklist in College object and application form object:



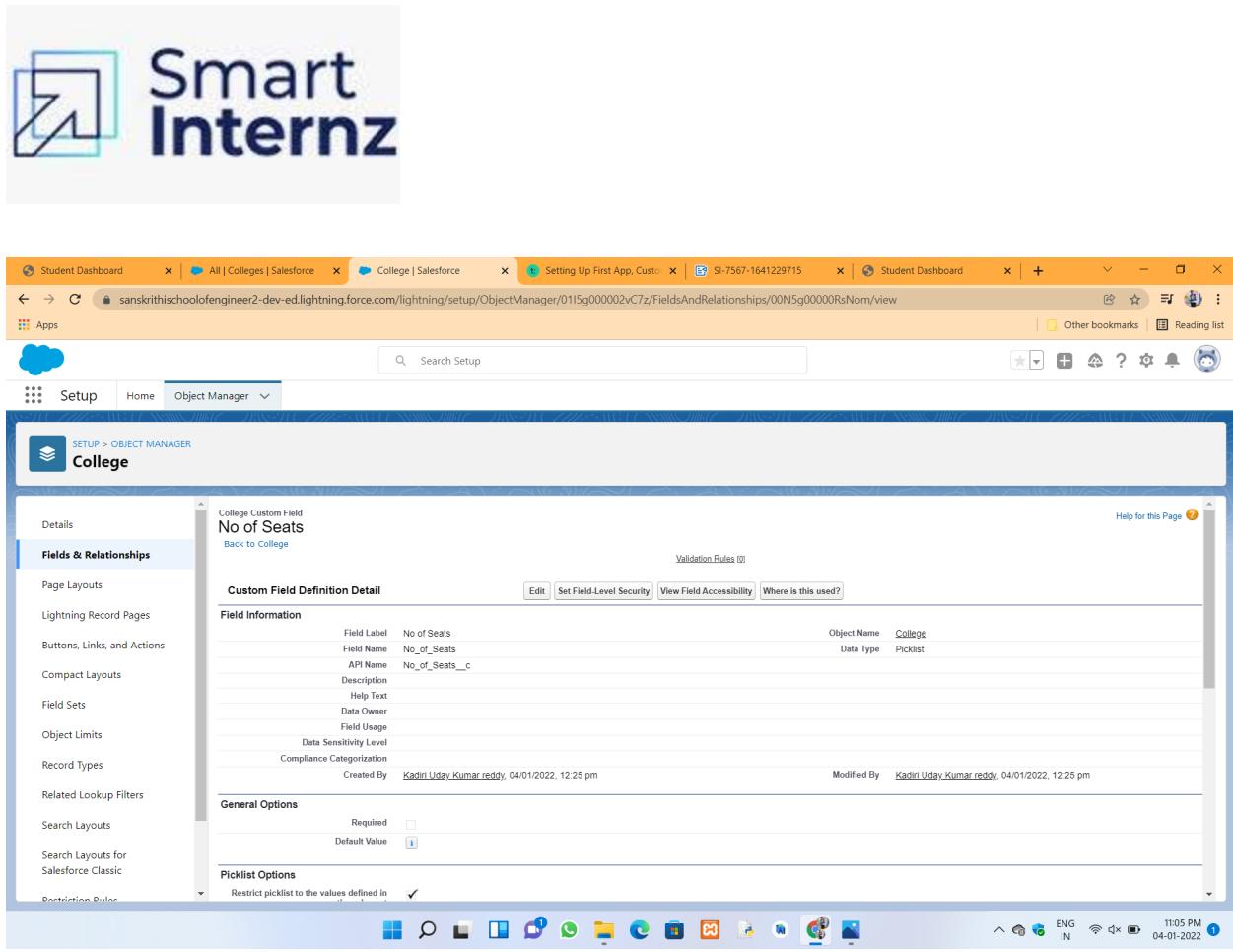
The screenshot shows the Salesforce Setup interface for creating a new custom field. The page title is "College New Custom Field". The left sidebar under "Fields & Relationships" includes options like Details, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, Search Layouts for Salesforce Classic, and Restriction Rules. The main form is titled "Step 2. Enter the details" and shows the following configuration:

- Field Label:** College Email
- Values:** Enter values, with each value separated by a new line. A text area contains:

```
mit@gmail.com
mit@outlook.com
mit@cnu.com
mit@maa.com
mit@mum.com
mit@del.com
```
- Field Name:** College_Email
- Description:** (empty)

At the bottom right, there are "Previous", "Next", and "Cancel" buttons. The status bar at the bottom right shows the date and time: 04-01-2022 09:52 PM.

Capacity of students in college picklist in College object :



Field dependencies between College name and college email :

A screenshot of a Microsoft Edge browser window displaying the Salesforce Setup interface. The URL is <https://sanskrithischoolofengineering2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115g0000002vC7z/ValidationRules/new>. The page title is "College Validation Rule".

The validation rule is named "College_Name_Similar" and is active. The error condition formula is "Name <> TEXT(College_Name__c)". A dropdown menu for functions shows options like ABS, ADDMONTHS, AND, BEGINS, BLANKVALUE, BR, and ABS(number). The status bar at the bottom right shows "10:27 PM 04-01-2022".

Field dependencies between college name and capacity of students :



Screenshot of the Salesforce Setup interface showing the Object Manager for the "College" object.

The page title is "SETUP > OBJECT MANAGER College".

Left sidebar (Fields & Relationships):

- Details
- 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 Salesforce Classic

Main Content Area:

Controlling Field: College Name
Dependent Field: No of Seats

Instructions:

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once
- Use SHIFT + click to select a range of adjacent cells. Use CTRL + click to select multiple cells that are not adjacent
- Use the Preview button to test the results.

Legend:

- Excluded Value (grey)
- Included Value (yellow)

Table Data:

College Name:	MIT - BLR	MIT - MAA	MIT - HYD	MIT - DEL	MIT - MUM
No of Seats:	500-1500	500-1500	500-1500	500-1500	500-1500
	1500-3000	1500-3000	1500-3000	1500-3000	1500-3000
	3000-5000	3000-5000	3000-5000	3000-5000	3000-5000
	5000-8000	5000-8000	5000-8000	5000-8000	5000-8000
	8000-12000	8000-12000	8000-12000	8000-12000	8000-12000

Buttons at the bottom:

- Save
- Cancel
- Preview

Page URL: https://sanskritischoolofengineer2-dev-ed.my.salesforce.com/one/one.app#/alohaRedirect/p/dependency/EditDependencyU/e/itableEnumOrId=01l5g000002vC7z&controller=00N5g00000RsNoN&dependent=00N5g00000RsNom&retURL=%2Fsetup%2Fui%2FdependencyList.jsp...

System status bar:

- ENG IN
- 11:08 PM
- 04-01-2022

College object fields and relationships :

A screenshot of a web browser displaying the Salesforce Setup interface. The URL in the address bar is "sanskritischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5g000002vC7z/FieldsAndRelationships/view". The page title is "College | Salesforce".

The main content area shows the "Fields & Relationships" section for the "College" object. On the left, there is a sidebar with various setup categories like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The "Fields & Relationships" section is currently selected and expanded, showing a table with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College Email	College_Email__c	Picklist	College Name	
College fee	College_fee__c	Currency(7, 7)		
College Name	College_Name__c	Picklist		
College Name	Name	Text(80)		
Created By	CreatedById	Lookup(User)		
Hostel fee	Hostel_fee__c	Currency(6, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
No of Seats	No_of_Seats__c	Picklist	College Name	
Owner	OwnerId	Lookup(User,Group)		

Application form fields and relationships :

The screenshot shows a web browser window with multiple tabs open. The main content is the Salesforce Setup interface, specifically the Object Manager for the 'Application Form' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The central area displays a table titled 'Fields & Relationships' with 8 items. The columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows show fields such as College, College_fee__c, Created_By, Date_of_Birth, Email, Form_Number, Last_Modified_By, and Student_Name__c. A status message at the bottom right of the table area says 'Windows Security - No actions needed.' The browser's address bar shows the URL: sanskritischoolengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5g000002vCbm/FieldsAndRelationships/view. The system tray at the bottom right indicates the date as 05-01-2022 and time as 05:27 PM.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓
Form Number	Name	Auto Number		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Student Name	Student_Name__c	Text(30)		▼

College management application overview all things :



Screenshot of a web browser showing a Salesforce Lightning interface for College Management. The URL is sanskrithischoolofengineer2-dev-ed.lightning.force.com/lightning/o/College_c/list?filterName=00B5g00000WMKrYEAX.

The page displays a list of colleges with the following data:

Record ID	College fee	College Name	Hostel fee
a0N5g00000vJ0EAE	\$50,000.000000	mit	\$70,000.00

The browser window also shows other tabs like Student Dashboard, College | Salesforce, Setting Up First App, and various system status icons at the bottom.



Screenshot of the "New College" form in Salesforce.

Information

- *College Name:
- Owner: Kadiri Uday Kumar reddy
- College Name: --None--
- College fee: 0.00
- College Email: --None--
- Hostel fee:
- No of Seats: --None--

System Information

- Record info:

Buttons: Cancel, Save & New, Save

Screenshot of the "New Application Form" form in Salesforce.

Information

- Form Number:
- *College: Search Colleges...
- Student Name:
- *Email:
- Date of Birth:

Buttons: Cancel, Save & New, Save



Day 3 :

Topic : In college management application to add custom objects and give the permissions to the system administrator and adding the business logic and automation and email templates.

Milestones / Activities : Creating the custom objects and give the permissions to users and add business logic and automation and email templates.

Description :

Student object to create as a custom and in this object to create some fields. This are given below:

Student Name	Text
Address	Text(255)
Application Form	Lookup(Application Form)
College Name	Formula(Text)
Date Of Birth	Date
Guardian Name	Text(30)
Phone	Phone

Subject object to create as a custom and in this object to create some fields. This are given below :



Subject ID : AutoNumber

Student : Lookup(Student)

Paper 1 : Picklist(Refer Business Logic Milestone)

Paper2 : Picklist(Refer Business logic Milestone)

Schema Builder :

Schema Builder is a tool within Salesforce.com that is used to view and manage objects, fields, and relations between objects in a graphical interface. It is available in all Salesforce.com editions. Schema Builder is not the only option to view and manage objects, fields, and relations between objects.

Permission give to the profiles and access to the system administrator :

The Salesforce administrator—or “admin” is a Salesforce user with system administration duties and other super powers. Admins are responsible for setting up Salesforce for their organizations and making sure it runs smoothly. Admins have special permissions.

Account object to create Saving account and Business account and GST Number :

To access this ones in college management application

Email Templates and related information :

Email templates with merge fields let you quickly send emails that include field data from Salesforce records like contacts, leads, or opportunities. You can use email templates when emailing groups of people – with list email or mass email– or just one person.



Snapshots of Milestones / Activities :

College object fields and relationships :

A screenshot of a web browser window showing the Salesforce Setup interface. The address bar shows the URL: sanskritischoolschoolofengineering2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01l5g000002vC7z/FieldsAndRelationships/view. The main content area displays the 'Fields & Relationships' section for the 'College' object. The table lists ten items, sorted by Field Label. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
College Email	College_Email__c	Picklist	College Name	
College fee	College_fee__c	Currency(7, 7)		
College Name	College_Name__c	Picklist		
College Name	Name	Text(80)		
Created By	CreatedById	Lookup(User)		
Hostel fee	Hostel_fee__c	Currency(6, 2)		
Last Modified By	LastModifiedById	Lookup(User)		
No of Seats	No_of_Seats__c	Picklist	College Name	
Owner	OwnerId	Lookup(User,Group)		

The left sidebar shows navigation links for 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, and Search Layouts for Salesforce Classic. The bottom right corner shows system status icons and the date/time: 05:19 PM 05-01-2022.

Application form object fields and relationships :

A screenshot of a Windows desktop showing a browser window with multiple tabs open. The active tab is "Object Manager" under "Setup" for the "Application Form" object. The main content area displays a table titled "Fields & Relationships" with 8 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓
Form Number	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		▼
Student Name	Student_Name__c	Text(30)		▼

A tooltip in the bottom right corner of the table area says "Windows Security - No actions needed." The system tray at the bottom shows various icons and the date/time as 05-01-2022 05:27 PM.

Student object to create as a custom :



A screenshot of a Microsoft Edge browser window displaying the Salesforce Setup interface. The title bar shows multiple tabs including "Hands-On Orgs", "Student Dashboard", "Recently Viewed | Students", "New Custom Object | Sales", "Si-7567-1641229715", and "Profiles, Recordtypes, Automations". The main content area is titled "New Custom Object" under the "SETUP" tab. The "Custom Object Definition Edit" page is shown, with the "Label" field set to "Student" and the "Plural Label" field set to "Students". 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", "Save & New", and "Cancel" are visible at the top right. The status bar at the bottom shows system information like battery level, signal strength, and the date/time (05-01-2022, 08:51 PM).

In this custom object to create Student Name field :

A screenshot of a Microsoft Windows desktop showing a web browser window for the Salesforce Setup interface. The URL is <https://sanskrithischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115g000002vCMf/FieldsAndRelationships/new>. The page title is "Student New Custom Field". The left sidebar shows "FIELDS & RELATIONSHIPS" selected. The main form is titled "Step 2. Enter the details" and contains the following fields:

- Field Label: Address
- Length: 255
- Field Name: Address
- Description: (empty)
- Help Text: (empty)
- 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

The status bar at the bottom right shows "08:52 PM 05-01-2022".

In this custom object to create Address field :



A screenshot of the Salesforce Setup interface. The top navigation bar shows tabs like "Hands-On Orgs", "Recently Viewed | Students", "Student Dashboard", "Student | Salesforce", and "SI-7567-1641229715". The main title is "Profiles, Recordtypes, Automations & Fields". The left sidebar is titled "SETUP > OBJECT MANAGER" and shows "Student". Under "Fields & Relationships", the "Fields & Relationships" tab is selected, showing options like "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", etc. The main content area is titled "Student New Custom Field" and "Step 2: Enter the details". It shows a form with fields: "Field Label" (Address), "Length" (255), "Field Name" (Address), "Description" (empty), and "Help Text" (empty). Below the form are sections for "Required" (checkboxes for "Always require a value" and "Do not allow duplicate values"), "Unique" (radio buttons for "Treat 'ABC' and 'abc' as duplicate values (case insensitive)" and "Treat 'ABC' and 'abc' as different values (case sensitive)"), and "External ID" (checkbox for "Set this field as the unique record identifier from an external system"). A progress bar at the top right indicates "Step 2 of 4". The bottom of the screen shows the Windows taskbar with various pinned icons and the date/time "08:52 PM 05-01-2022".

In this custom object to create Application Form field :

A screenshot of a web browser displaying the Salesforce Setup interface. The URL in the address bar is <https://sanskritischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015g000002vCMf/FieldsAndRelationships/new>. The page title is "Student | Salesforce". The main content area shows the "New Relationship" step of the "Object Manager" setup. On the left, a sidebar lists various configuration options under "Fields & Relationships". The right panel displays the "Step 2. Choose the related object" screen, where "Application Form" is selected as the related object. The browser's taskbar at the bottom shows various open tabs and system icons.

In this custom object to create College name field :

A screenshot of a web browser displaying the Salesforce Setup interface. The URL is <https://sanskritischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115g000000vCMf/FieldsAndRelationships/new>. The page title is "Object Manager".

The main content area shows the creation of a new field for the "Student" object. The "Field Label" is set to "College Name" and the "Field Name" is set to "College_Name". The "Formula Return Type" is selected as "Text". A tooltip for "Text" states: "Create a text string, for example, by concatenating other text fields. Example: [Full Name = LastName &_amp; FirstName]". Other options like Checkbox, Currency, Date, etc., are also listed with their descriptions.

In this custom object to create Date of Birth field :



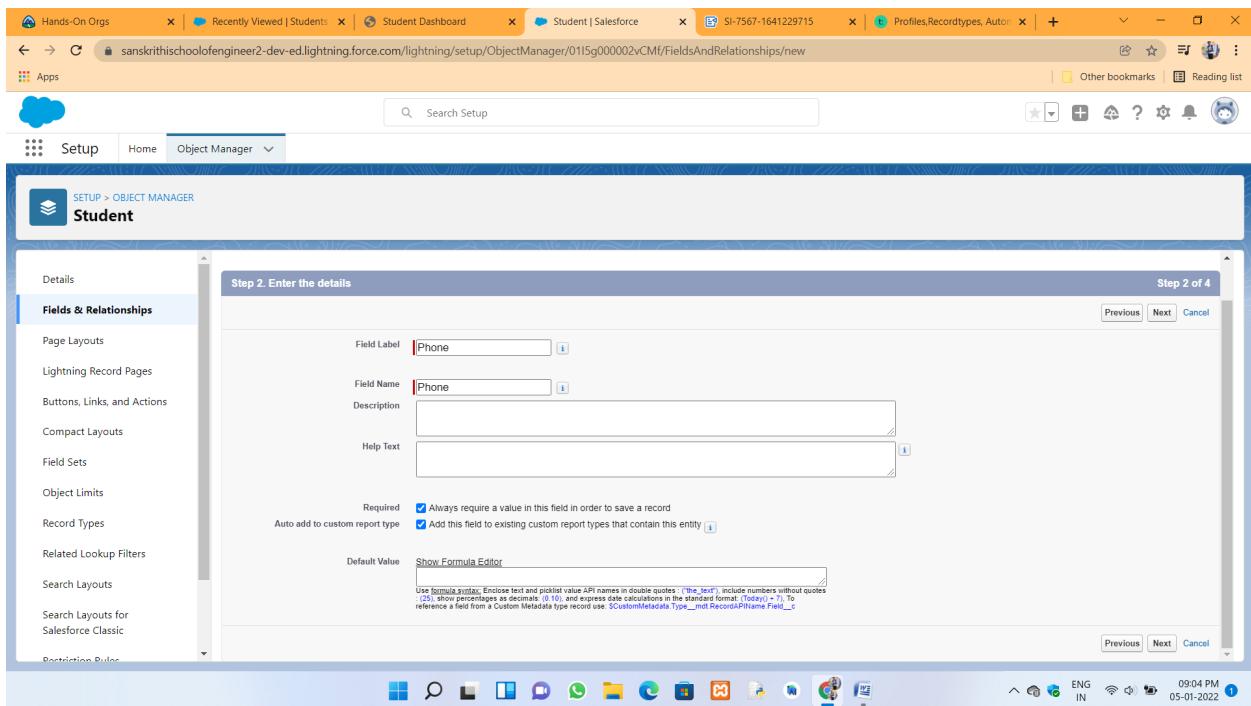
A screenshot of the Salesforce Setup interface. The title bar shows multiple tabs: "Student Dashboard", "Recently Viewed | Application", "Application Form | Salesforce", "Setting Up First App. Cust...", "Si-7567-1641229715", "Student Dashboard", and several others. The main area is titled "Application Form" under "SETUP > OBJECT MANAGER". A sub-header "New Custom Field" is displayed. On the left, a sidebar lists various setup categories like "Details", "Fields & Relationships", "Page Layouts", etc. The main form is titled "Step 2. Enter the details" and "Step 2 of 4". It contains fields for "Field Label" (set to "Date of Birth"), "Field Name" (set to "Date_of_Birth"), "Description" (empty), and "Help Text" (empty). Under "Required", there are two checkboxes: "Always require a value in this field in order to save a record" (unchecked) and "Add this field to existing custom report types that contain this entity" (checked). A "Default Value" section includes a "Show Formula Editor" button and a note about formula syntax. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray indicating the date and time as "04-01-2022 10:41 PM".

In this custom object to create Guirdian Name field :



The screenshot shows the Salesforce Setup interface for creating a new custom field. The page title is "Student New Custom Field". The left sidebar is titled "Fields & Relationships" and lists various options like Details, Page Layouts, Lightning Record Pages, etc. The main form is Step 2 of 4, titled "Enter the details". It includes fields for "Field Label" (Guardian Name), "Length" (30), "Field Name" (Guardian_Name), "Description", "Help Text", and "Required" settings (checkboxes for Always require a value, Unique, and External ID). The status bar at the bottom shows system information including the date (05-01-2022) and time (09:04 PM).

In this custom object to create Phone field :



A screenshot of the Salesforce Setup interface, specifically the Object Manager for the "Student" object. The page title is "Step 2. Enter the details". The left sidebar shows navigation options like 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, and Search Layouts for Salesforce Classic. The main form has the following fields:

- Field Label: Phone
- Field Name: Phone
- Description: (empty)
- Help Text: (empty)
- Required: Always require a value in this field in order to save a record
- Auto add to custom report type: Add this field to existing custom report types that contain this entity
- Default Value: Show Formula Editor (with a note about formula syntax)

The status bar at the bottom indicates the system is in English (ENG) and the date is 05-01-2022.

Subject object to create as a custom :

A screenshot of a web browser displaying the Salesforce Setup interface. The URL is sanskrithischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/new. The page title is "New Custom Object".

The "Custom Object Definition Edit" section shows the following details:

- Custom Object Information:**
 - Label: Subject (Example: Account)
 - Plural Label: Subjects (Example: Accounts)
 - Starts with vowel sound:
- The Object Name is used when referencing the object via the API.
 - Object Name: Subject (Example: Account)
- Description:** A large text input field.
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a visualforce page
- Content Name:**

At the top of the page, there are several tabs: "Hands-On Orgs", "Recently Viewed | Students", "Student Dashboard", "New Custom Object | Sales:", "SI-7567-1641229715", "Profiles, Recordtypes, Auto...", and "Other bookmarks | Reading list". The "Setup" tab is currently selected. The status bar at the bottom right shows the date and time: "05-01-2022 09:15 PM".

In this custom object to create Student ID field :

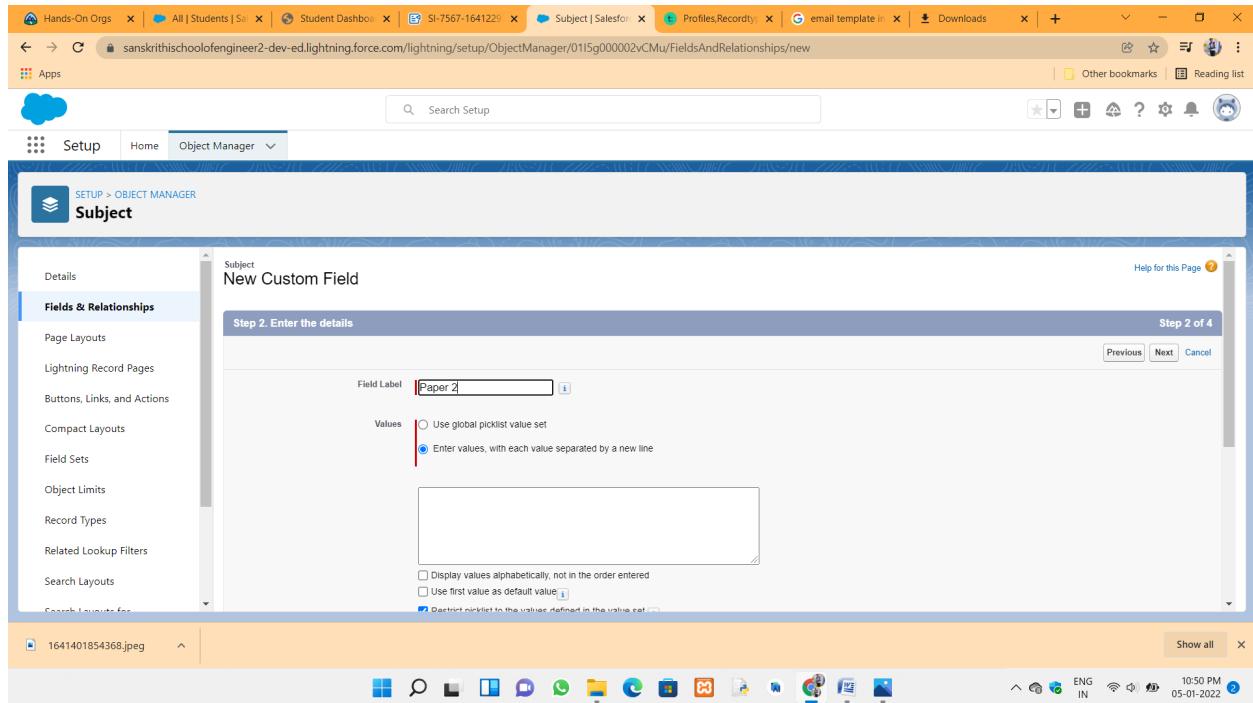


The screenshot shows the Salesforce Setup interface for creating a new custom field. The page title is "Subject New Custom Field". The "Step 2. Enter the details" section is active, indicated by a blue header bar. The "Field Label" is set to "Subject ID", "Display Format" is "S-(000000)", "Starting Number" is "1", and "Field Name" is "Subject_ID". The "Description" and "Help Text" fields are empty. Under "External ID" settings, the "Set this field as the unique record identifier from an external system" checkbox is unchecked, while the "Add this field to existing custom report types that contain this entity" checkbox is checked. On the left sidebar, under the "Fields & Relationships" category, "Page Layouts" is selected. The bottom of the screen shows the Windows taskbar with various application icons and the system tray indicating the date and time as 05-01-2022 at 09:16 PM.

In this custom object to create Paper1 field :

A screenshot of a Microsoft Edge browser window displaying the Salesforce Setup interface. The URL in the address bar is <https://sanskritischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/015g000002vCMu/FieldsAndRelationships/new>. The page title is "Subject". The left sidebar shows navigation options like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled "New Custom Field" and "Step 2. Enter the details". It shows a "Field Label" input field containing "Paper 1". Under "Values", there are two radio button options: "Use global picklist value set" (unchecked) and "Enter values, with each value separated by a new line" (checked). A large text input area is present for entering values. At the bottom, there are checkboxes for "Display values alphabetically, not in the order entered" and "Use first value as default value". A note at the bottom says "Restrict picklist to the values defined in the value category". The top of the browser window shows several open tabs related to Salesforce setup and development. The taskbar at the bottom of the screen shows various pinned icons and the system tray indicates the date and time as 05-01-2022 at 10:50 PM.

In this custom object to create Paper 2 field :



A screenshot of the Salesforce Setup interface, specifically the Object Manager for the 'Subject' object. The page title is 'New Custom Field'. The 'Fields & Relationships' tab is selected in the sidebar. The 'Field Label' is set to 'Paper 2'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected. A large text input area is present for entering values. The status bar at the bottom shows the file '1641401854368.jpeg' is open, along with system information like battery level, network, and date/time (10:50 PM, 05-01-2022).

In this custom object to create Student field :

A screenshot of a computer screen displaying the Salesforce Setup interface. The browser address bar shows the URL: sanskritischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5g000002vCMu/FieldsAndRelationships/new. The main window is titled "Subject New Relationship". The left sidebar lists various setup options under "Fields & Relationships", including Details, 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 Salesforce Classic, and Restriction Rules. The central panel is titled "Step 2. Choose the related object" and contains a dropdown menu labeled "Related To" with "Student" selected. Navigation buttons "Previous", "Next", and "Cancel" are visible at the bottom of this panel. The system status bar at the bottom right shows the date and time as "09:17 PM 05-01-2022".

Student object under fields :

A screenshot of a Microsoft Windows desktop showing a web browser window for the Salesforce Setup interface. The URL is <https://sanskritischoolofengineering2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0115g000002vCMp/FieldsAndRelationships/view>. The browser tab shows "Student | Salesforce". The main content area displays the "Fields & Relationships" section for the "Student" object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main table lists ten fields: Address, Application Form, Created By, Date of Birth, Guardian Name, Last Modified By, Owner, and Phone. The table includes columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The "Address" field is a Text(255) type. The "Application Form" field is a Lookup(Application Form) type. The "Created By" field is a Lookup(User) type. The "Date of Birth" field is a Date type. The "Guardian Name" field is a Text(30) type. The "Last Modified By" field is a Lookup(User) type. The "Owner" field is a Lookup(User,Group) type. The "Phone" field is a Phone type. The "Owner" row has a dropdown arrow indicating it is expanded. The status bar at the bottom shows the file "1641401854368.jpeg" is open, along with system icons for battery, signal, and date/time (10:55 PM, 05-01-2022).

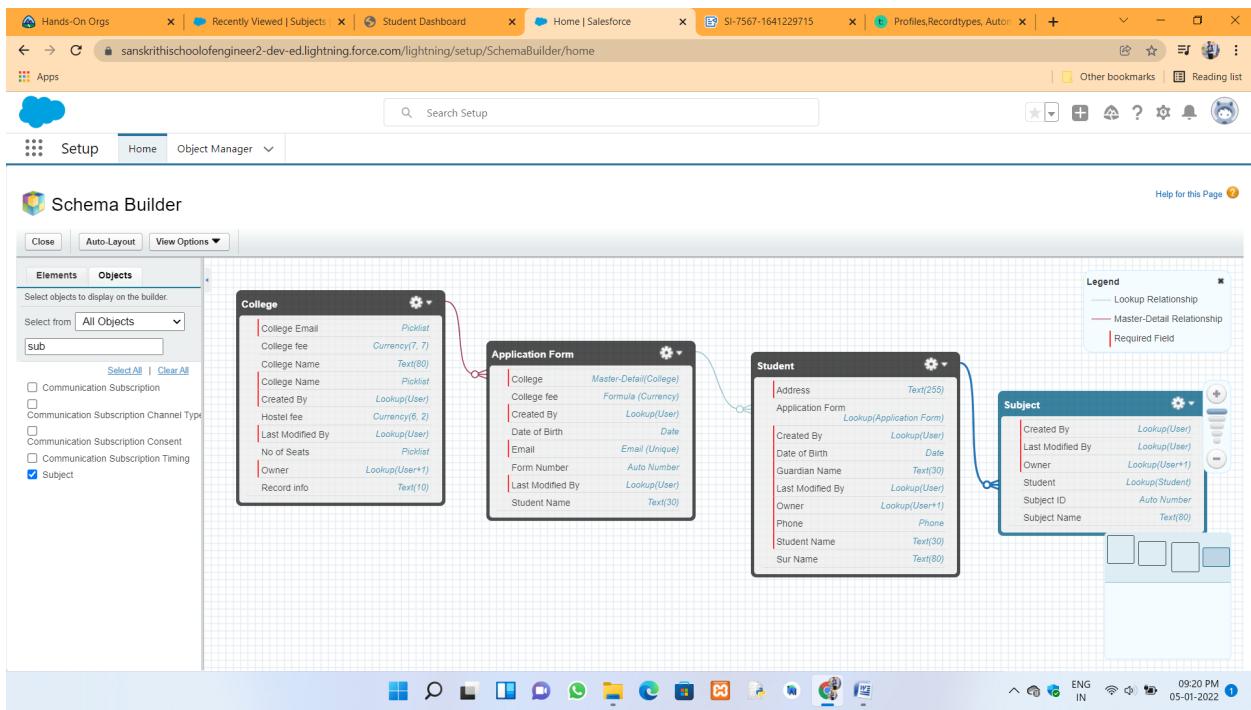
Subject object under fields :

A screenshot of a Microsoft Edge browser window displaying the Salesforce Setup interface. The URL is sanskritischoolofengineering2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I5g000002vCMu/FieldsAndRelationships/view. The page title is "SETUP > OBJECT MANAGER Subject". On the left, there's a sidebar with links like Details, Fields & Relationships (which is selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area shows a table titled "Fields & Relationships" with 6 items, sorted by Field Label. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

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)	✓	
Student	Student_c	Lookup(Student)	✓	
Subject ID	Subject_ID__c	Auto Number		
Subject Name	Name	Text(80)	✓	

The browser toolbar at the top includes tabs for Hands-On Orgs, All Students, Student Dashboard, Si-7567-164129, Subject | Salesforce, Profiles, Record, email template, Downloads, and a plus sign. The address bar shows the full URL. The taskbar at the bottom of the screen shows various pinned icons for Windows applications like File Explorer, Task View, and Control Panel.

Select relations through Schema builder :



Giving Accessing to the System administrator :



A screenshot of a Microsoft Edge browser window displaying the Salesforce Setup interface. The title bar shows multiple tabs including "Hands-On Orgs", "All | Application Forms | Sales", "Student Dashboard", "Profiles | Salesforce", and "Profiles, Recordtypes, Automations | SL-7567-1641229715". The main content area is titled "Profiles" under "SETUP". A sub-section titled "Clone Profile" is active. It displays a message: "Enter the name of the new profile." Below this, a note says "You must select an existing profile to clone from." A dropdown menu for "Existing Profile" is set to "System Administrator". Under "User License", it is set to "Salesforce". The "Profile Name" field contains "Test profile". At the bottom are "Save" and "Cancel" buttons. On the left sidebar, under "Users", "Profiles" is selected. A global search bar at the top has "profil" typed into it. The taskbar at the bottom shows various pinned icons and the system clock indicates 09:28 PM on 05-01-2022.

In the account object below record types and reflect into the college management application :



Screenshot of the Salesforce Setup interface showing the creation of a new Record Type for the Account object.

The browser address bar shows the URL: sanskritischoolofengineering2-dev-ed.lightning.force.com/lightning/setup/ObjectManager/Account/RecordTypes/new

The page title is "New Record Type Account".

The left sidebar navigation menu under "Record Types" includes:

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types** (selected)
- Related Lookup Filters
- Search Layouts
- Search Layouts for Salesforce Classic
- Hierarchy Columns

The main form is titled "Step 1. Enter the details" and contains the following fields:

Existing Record Type	<input type="text" value="--Master--"/>
Record Type Label	<input type="text" value="Saving Account"/>
Record Type Name	<input type="text" value="Saving_Account"/>
Description	<input type="text"/>
Active	<input checked="" type="checkbox"/>

A note below the form states: "Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles."

The "Profile Name" dropdown shows "Analytics Cloud Integration User". The "Record Types Currently Available" dropdown shows "Account". The "Make Available" checkbox is checked, while "Make Default" is unchecked.

The system status bar at the bottom right shows: ENG IN 09:35 PM 05-01-2022

Screenshot of the Salesforce Setup interface showing the creation of a new Record Type for the Account object.

Record Type Details:

- Existing Record Type:** -Master-
- Record Type Label:** Business Account
- Record Type Name:** Business_Account
- Description:** (empty)
- Active:**

Profile Name: Analytics Cloud Integration User

Record Types Currently Available: Saving Account (Default)

Buttons: Make Available (checked), Make Default (unchecked)

Help Text: Select Make Available to give users assigned to this profile the ability to create and clone records of this record type, or assign this record type to existing records. To make the new record type the default for a profile, select Make Default. Users assigned to this record type can still view and edit records associated with record types not available for their profiles.

Screenshot of the Salesforce Setup interface showing the creation of a new Custom Field for the Account object.

Custom Field Definition Detail:

Field Information:

Field Label	GST Number	Object Name	Account
Field Name	GST_Number	Data Type	Text
API Name	GST_Number__c		
Description	(empty)		
Help Text	(empty)		
Data Owner	(empty)		
Field Usage	(empty)		
Data Sensitivity Level	(empty)		
Compliance Categorization	(empty)		
Created By	Kadir Uday Kumar reddy, 05/01/2022, 12:08 pm	Modified By	Kadir Uday Kumar reddy, 05/01/2022, 12:08 pm

General Options:

Required	<input type="checkbox"/>
Unique	<input checked="" type="checkbox"/>
Case Sensitive	<input type="checkbox"/>
External ID	<input type="checkbox"/>
Default Value	(empty)



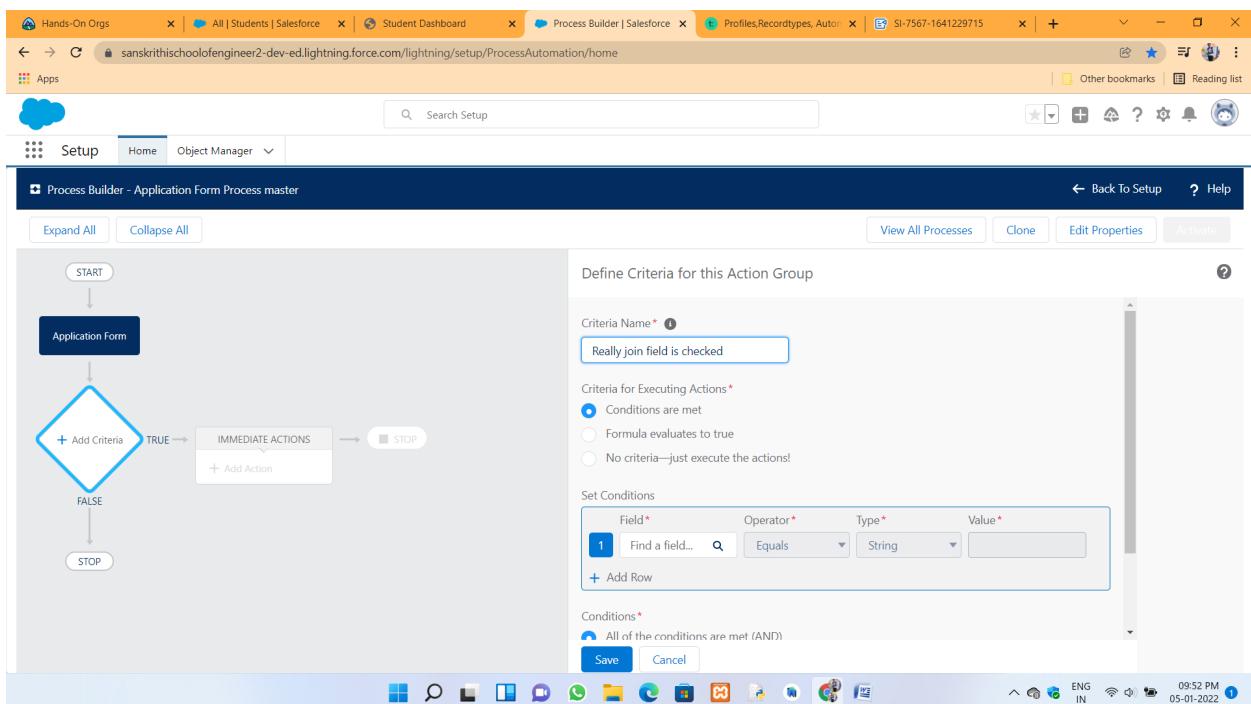
A screenshot of a Microsoft Edge browser window. The address bar shows a URL from a Salesforce instance. The main content area displays the Salesforce Lightning interface for "College Management". A modal dialog box titled "New Account" is open, prompting the user to "Select a record type". Three radio button options are shown: "Customer Account" (selected), "Business Account", and "Saving Account". Below the modal are "Cancel" and "Next" buttons. The background shows a list of recently viewed accounts under the "Accounts" tab. The system status bar at the bottom indicates the date as 05-01-2022 and the time as 11:06 PM.

Using Process Builder to Create application form process master :



A screenshot of a web browser displaying the Salesforce Process Builder interface. The title bar shows multiple tabs including "Hands-On Orgs", "All | Students | Salesforce", "Student Dashboard", "Process Builder | Salesforce", "Profiles, Recordtypes, Automations", and "SI-7567-1641229715". The main content area shows a "New Process" dialog box titled "New Process". Inside the dialog, there are fields for "Process Name*" (set to "Application Form Process master") and "API Name*" (set to "Application_Form_Process_master"). Below these are "Description" and "The process starts when*" dropdowns. A status table on the right lists 12 items, all modified in August 2021 and marked as "Active". The bottom of the screen shows a Windows taskbar with various icons and the system tray indicating the date as 05-01-2022 and time as 09:50 PM.

To create the process in Process Builder :



Email templates creation :



Screenshot of the Salesforce Classic Email Templates setup page.

The URL in the browser is: <https://sanskritischoolofengineer2-dev-ed.lightning.force.com/lightning/setup/CommunicationTemplatesEmail/page?address=%2F00X5g000000d1S%2Fe%3Fsetupid%3DCommunicationTemplatesEmail...>

The page title is "Classic Email Templates".

The "Email Template Edit" form is displayed:

- Email Template Information**
 - Folder: Unfiled Public Classic Email Templates
 - Available For Use:
 - Email Template Name: Test Email Templates
 - Template Unique Name: Test_Email_Templates
 - Encoding: Unicode (UTF-8)
 - Description: Testing
 - Subject: Hi Dear
 - Email Body:

```
Hi Dear

I am from Salesforce
```
- Buttons: Save, Save & New, Cancel

The left sidebar shows the navigation path: Setup > Email > Classic Email Templates.

The bottom status bar shows the file "1641401854368.jpeg" is open, along with system icons and the date/time "11:13 PM 05-01-2022".



Day 4 :

Topic : Process automation for Application form in the college management application Workflow and flow builder

Milestones / Activities : Workflow, Flowbuilder, Security model, overview of apex

Description :

Workflow : Workflow in Salesforce is basically a container or business logic engine which automates certain actions based on particular criteria. If the criteria are met, the actions get executed. When they are not met, records will get saved but no action will get executed. ... Workflow Rules.

The certain points to create

1. record type
2. email creation
3. task creation
4. outbound messages

Flow builder : In Salesforce, a flow is an application that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language.

some of the explanation about the flow builder working :



In this flow builder have a 5 different flows. You have to use screen flow and record triggered flows.

In this one two separate flows are there, This are free form and auto compete form. You have to work on both flows.

flow builder (Lightning Flow)

the different settings is get records and update records etc.

```
for (i=100) {  
    collection variables set, map, list  
    select id, Name from student where lame not empty limit 1,  
    for( i = 100 )  
        form clase date current day 30:  
        when readyto join as true (application form object), then only create a student record.  
        Stringm, id, date, list, set  
        in term of record trigger flows,  
        we have a variable called $Record. application form cord 40 SRecord prior holds old  
        data of application form
```

some important things you will see :

1. flow builder outbound message
2. Security model in salesforce :
 - object level security
 - field level security
 - record level security



a record that you are creating has to be private. only you will be able to record.

profile - test profile

college --> Application form both are in MD

you want the record to be private

Sharing Rule opens up when DWD is private or public read only

Overview of apex and some settings and datatypes discussed in this developer console :

It is programming language. it is similar to java and its developed in the vs editor and lwc editor

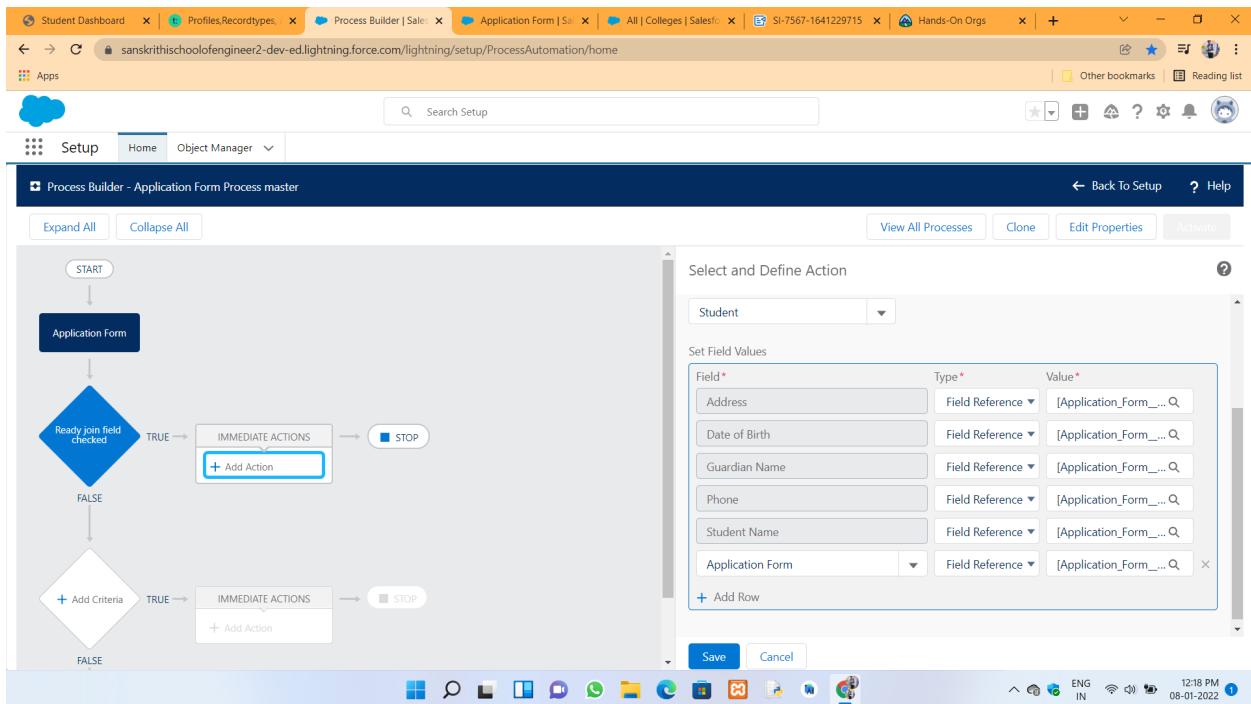
Screenshots of milestones / Activities :

Process automation for application form and it creates the process name is Application form process master :



A screenshot of a web browser displaying the Salesforce Process Builder interface. The title bar shows multiple tabs including "Hands-On Orgs", "All | Students | Salesforce", "Student Dashboard", "Process Builder | Salesforce", "Profiles, Recordtypes, Auto...", and "SI-7567-1641229715". The main content area shows a "Setup" menu bar with "Home" and "Object Manager" options. A sidebar on the left lists various process categories like "Advertise New Property", "Automate Opportunities", etc. A central modal window titled "New Process" is open, prompting for "Process Name*" (set to "Application Form Process master") and "API Name*" (set to "Application_Form_Process_master"). Below these fields are "Description" and "The process starts when*" dropdowns. At the bottom of the modal are "Cancel" and "Save" buttons. To the right of the modal, a list of existing processes is visible, showing columns for "MODIFIED", "STATUS", and "ACTIONS". The status for all listed processes is "Active". The system status bar at the bottom indicates "09:50 PM 05-01-2022".

Create The Student Record Using Flow :



The action of the ready to join in the student object :



A screenshot of a Salesforce application form page. The URL in the browser is "sanskritischoolofengineering2-dev-ed.lightning.force.com/lightning/r/Application_Form__c/a005g000000dMB4EAM/view". The page header shows "College Management" and various navigation links like Accounts, Contacts, Colleges, Application Forms (which is selected), Students, and Subjects. The main content area displays an "Application Form" titled "Form-0000000002". It includes sections for "Notes & Attachments" (with a file upload button) and "Students (1)" (listing a student with ID "a0R5g0000000VoLS"). On the right side, there is an "Activity" section with tabs for New Event, New Task, Log a Call, and Email, and a button to "Add". Below this is an "Upcoming & Overdue" section with a message: "No next steps. To get things moving, add a task or set up a meeting." The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray indicating the date and time as 08-01-2022 at 12:51 PM.

FLow builder Creating and actions in to be explained :



A screenshot of the Salesforce Flow Builder interface. The top navigation bar shows multiple tabs like "Student Dash", "Automation", "Flow Builder", and "Flows | Sales". The main area is titled "Flow Builder" with a sub-tab "Screen Flow". On the left, a "Toolbox" sidebar lists categories: Interaction (3), Logic (4), and Data (5). Under "Interaction", there are icons for Screen, Action, and Subflow. Under "Logic", there are Assignment, Decision, Loop, and Collection Sort. Under "Data", there are Create Records, Update Records, Get Records, Delete Records, and Roll Back Records. In the center, a flow diagram shows a single "Start" node, which is a rounded rectangle with a play button icon and the text "Start Screen Flow". At the bottom of the screen, there's a toolbar with buttons for "Run", "Debug", "Activate", "Save As", and "Save". The status bar at the bottom right shows the date and time: "01:22 PM 08-01-2022".

Get Records and loop and new assignment and update records :

Screenshot of the Salesforce Flow Builder interface showing the "Edit Get Records" configuration.

Toolbox Elements:

- Interaction (3): Screen, Action, Subflow
- Logic (4): Assignment, Decision, Loop, Collection Sort
- Data (5): Create Records, Update Records, Get Records, Delete Records, Roll Back Records

Get student record (get_student_record) Configuration:

- Object:** Student
- Filter Student Records:** Condition Requirements: All Conditions Are Met (AND)
 - Field: Date_of_Birth_c, Operator: Is Null, Value: False
- Sort Student Records:** Sort Order: Last Created

Toolbar Buttons: Debug, Activate, Save As, Save

Screenshot of the Salesforce Flow Builder interface showing the "Edit Loop" configuration.

Toolbox Elements:

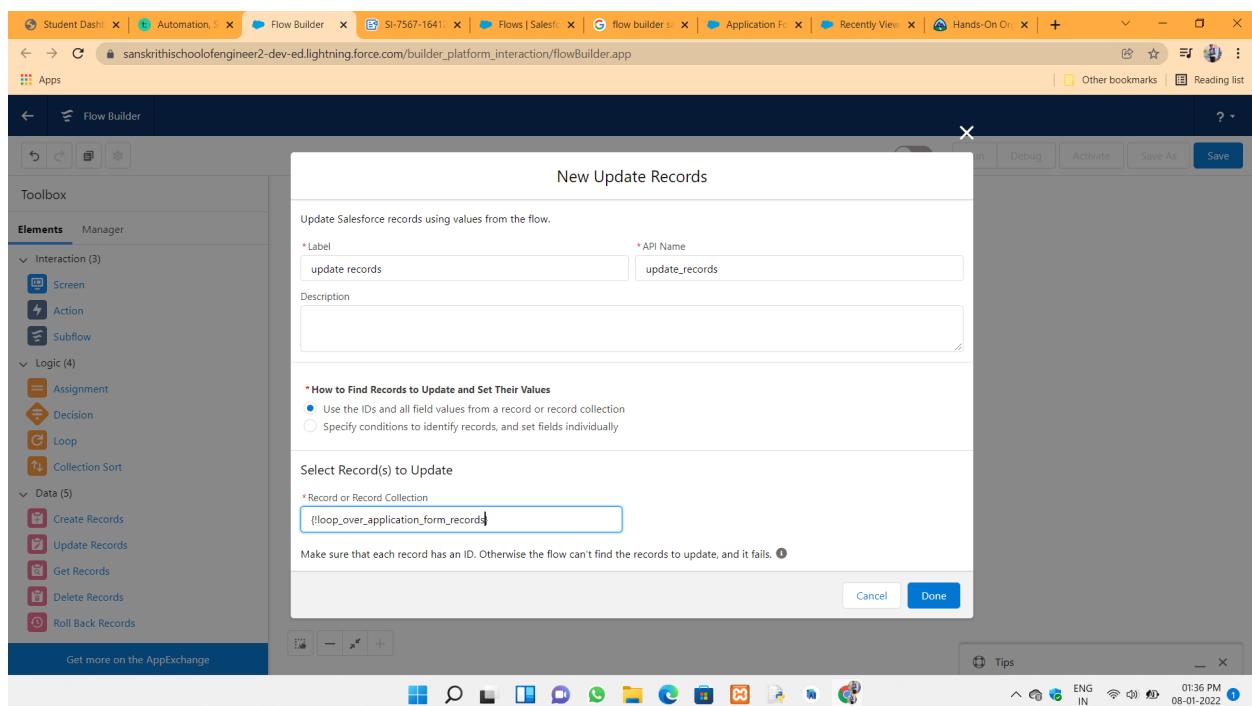
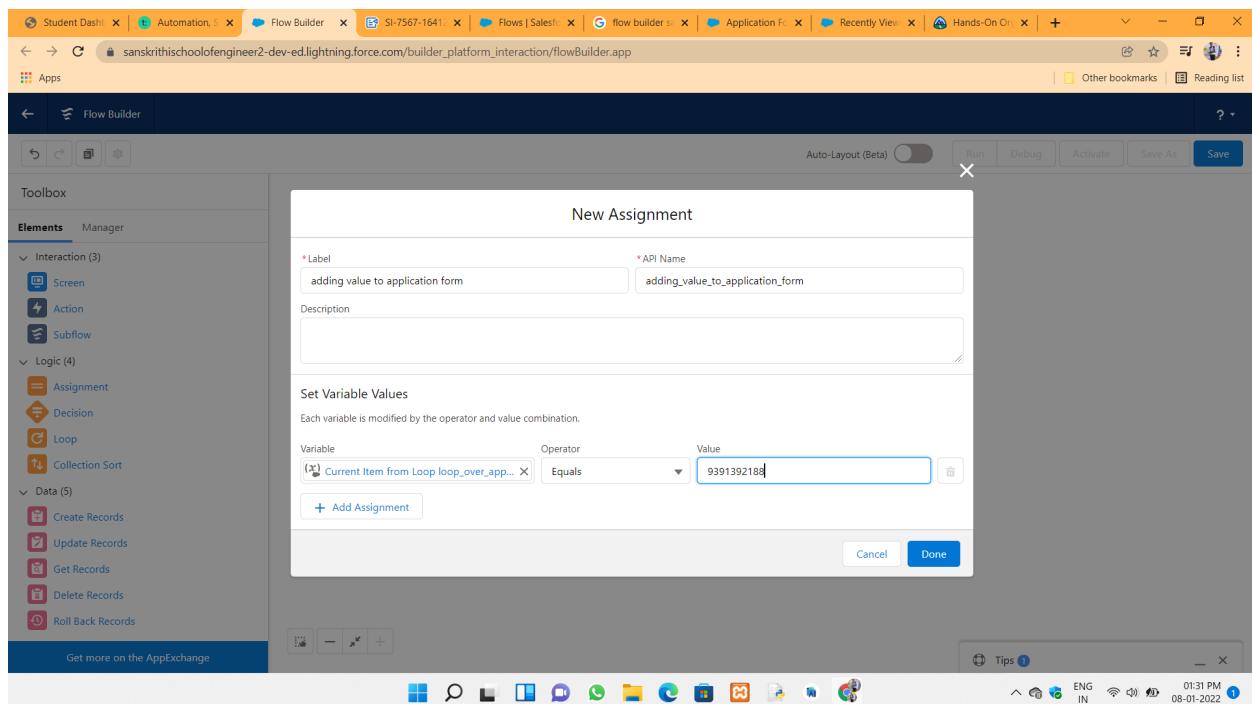
- Interaction (3): Screen, Action, Subflow
- Logic (4): Assignment, Decision, Loop, Collection Sort
- Data (5): Create Records, Update Records, Get Records, Delete Records, Roll Back Records

loop over application form records (loop_over_application_form_records) Configuration:

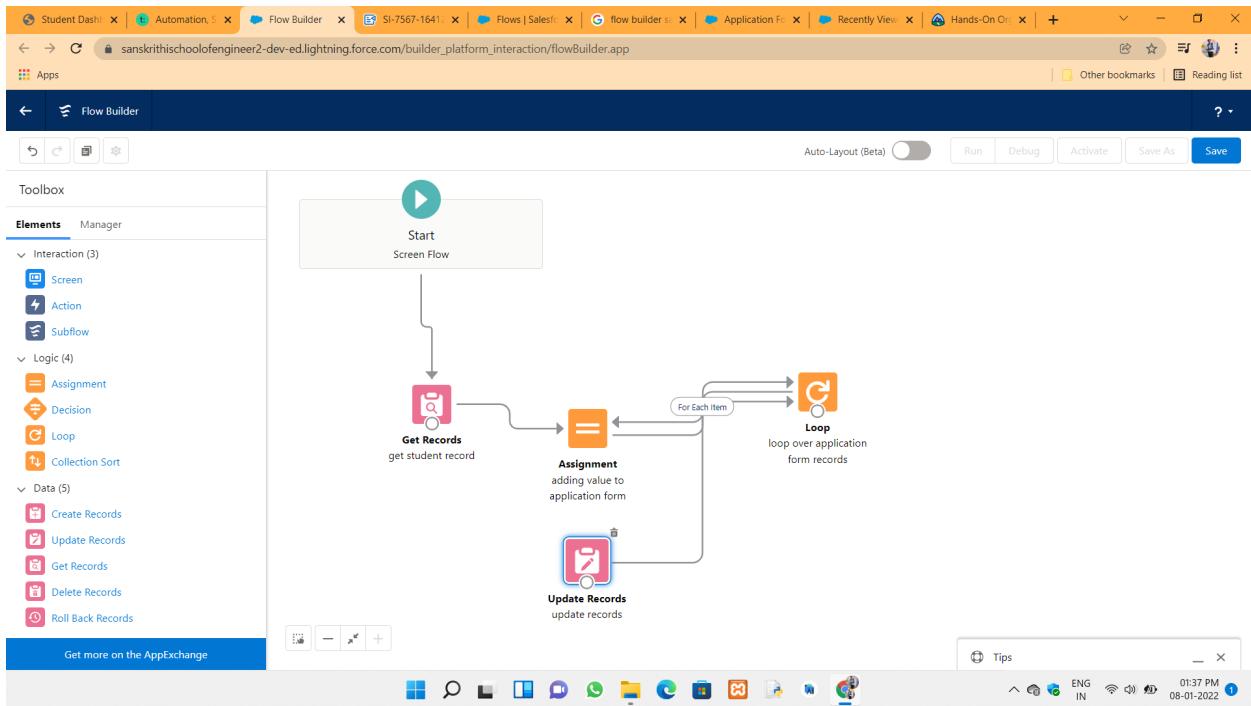
- Select Collection Variable:** Collection Variable: \${get_student_record}
- Specify Direction for Iterating Over Collection:** Direction:
 - First item to last item (selected)
 - Last item to first item

Info Message: To use the current item in other elements in the loop, use the API name of the Loop element. Example: if your flow iterates over accounts with a Loop element named "My_Account_Loop" you can reference the current item from that loop element. Just start typing "My_Account_Loop" and select "Current Item from Loop My_Account_Loop".

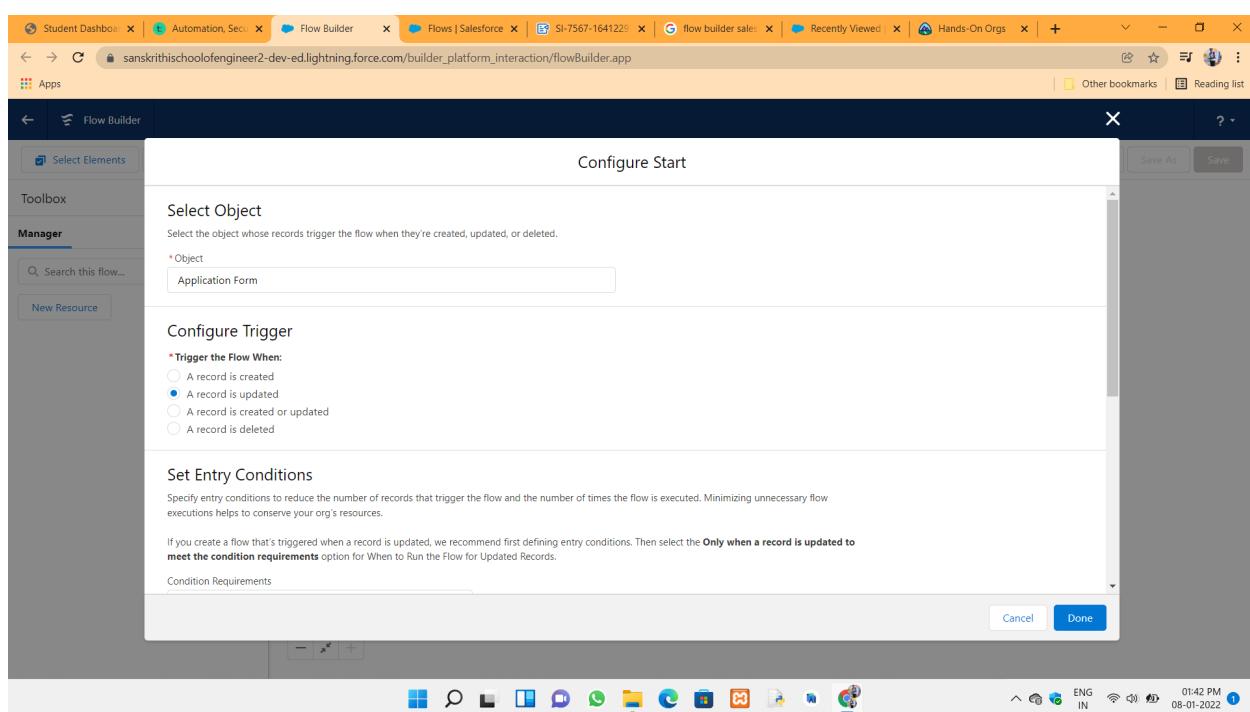
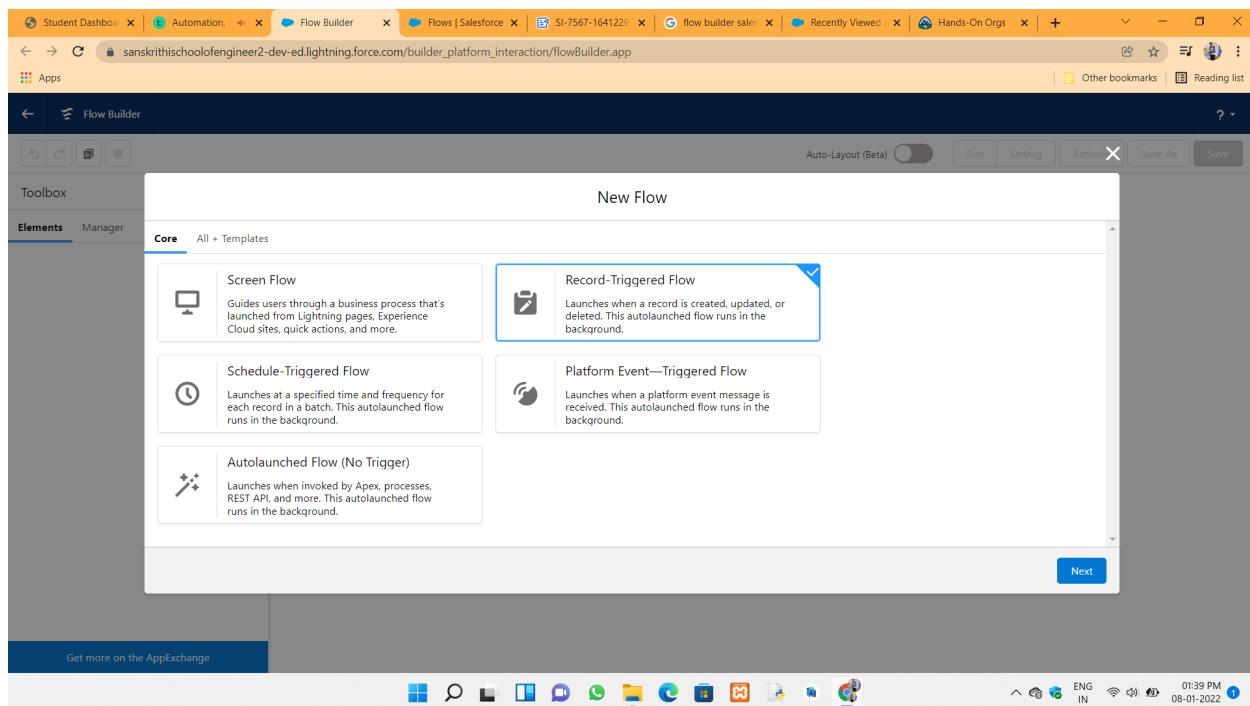
Toolbar Buttons: Auto-Layout (Beta), Debug, Activate, Save As, Save

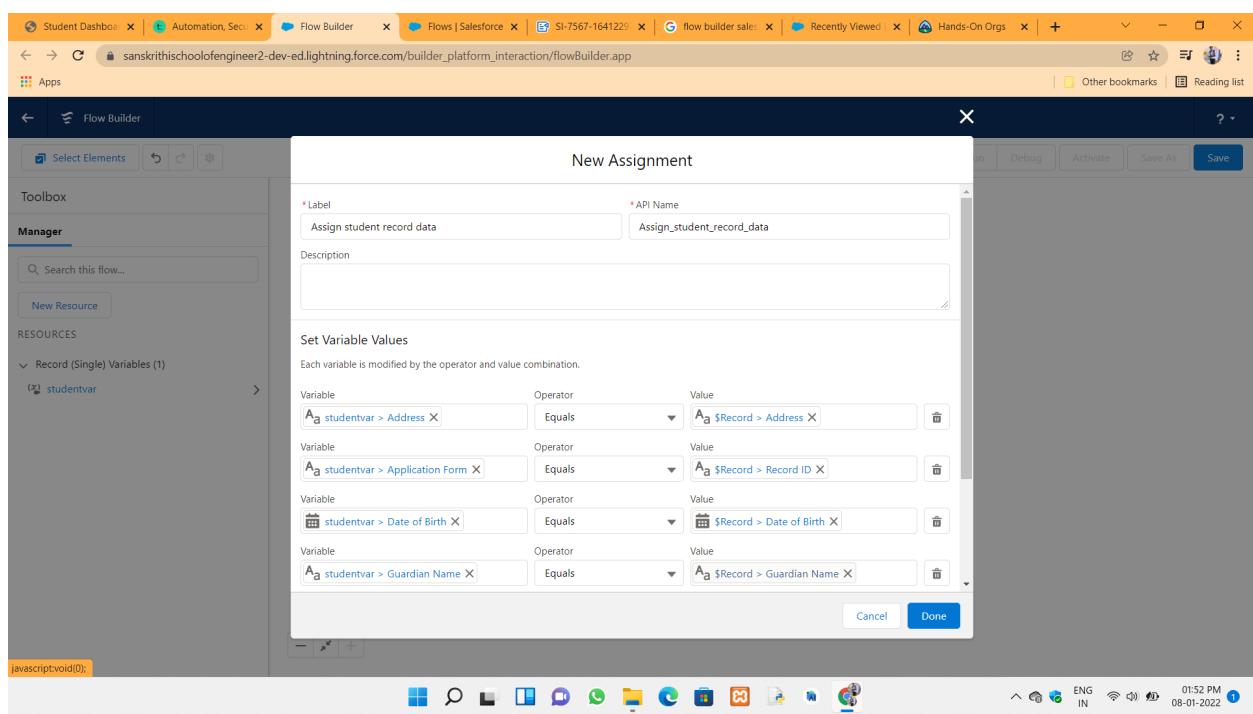
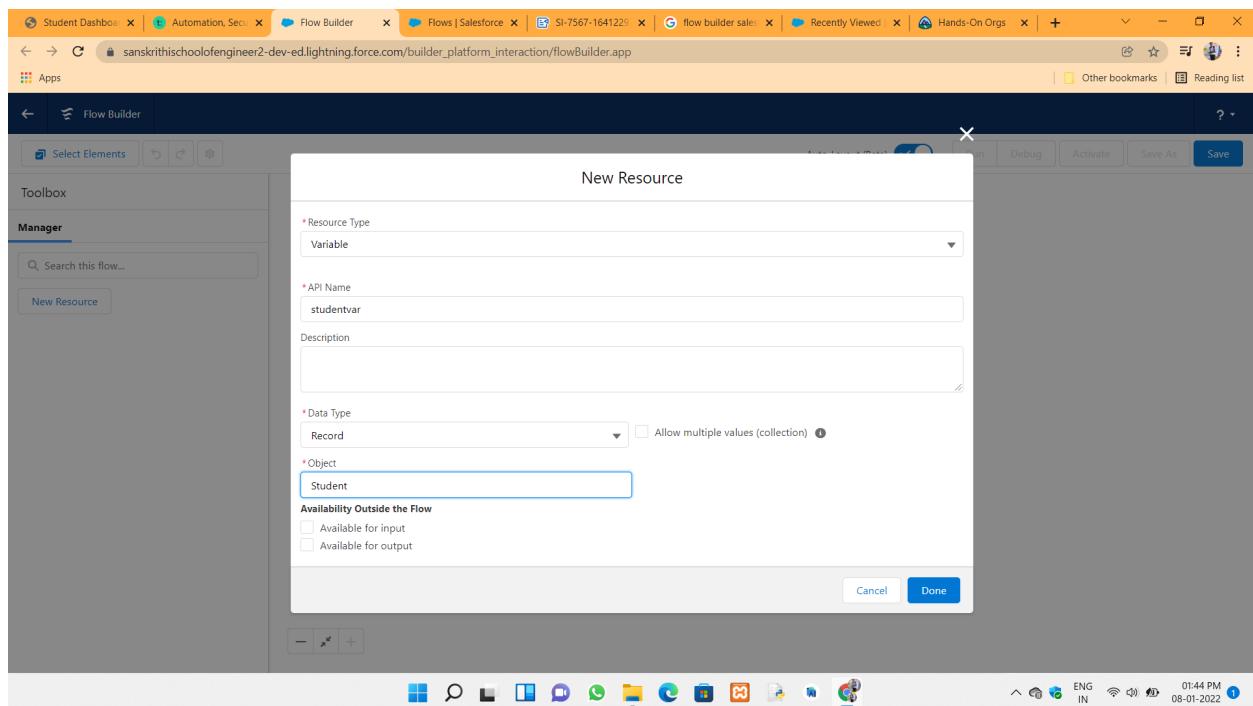


The total flow is below shown all :

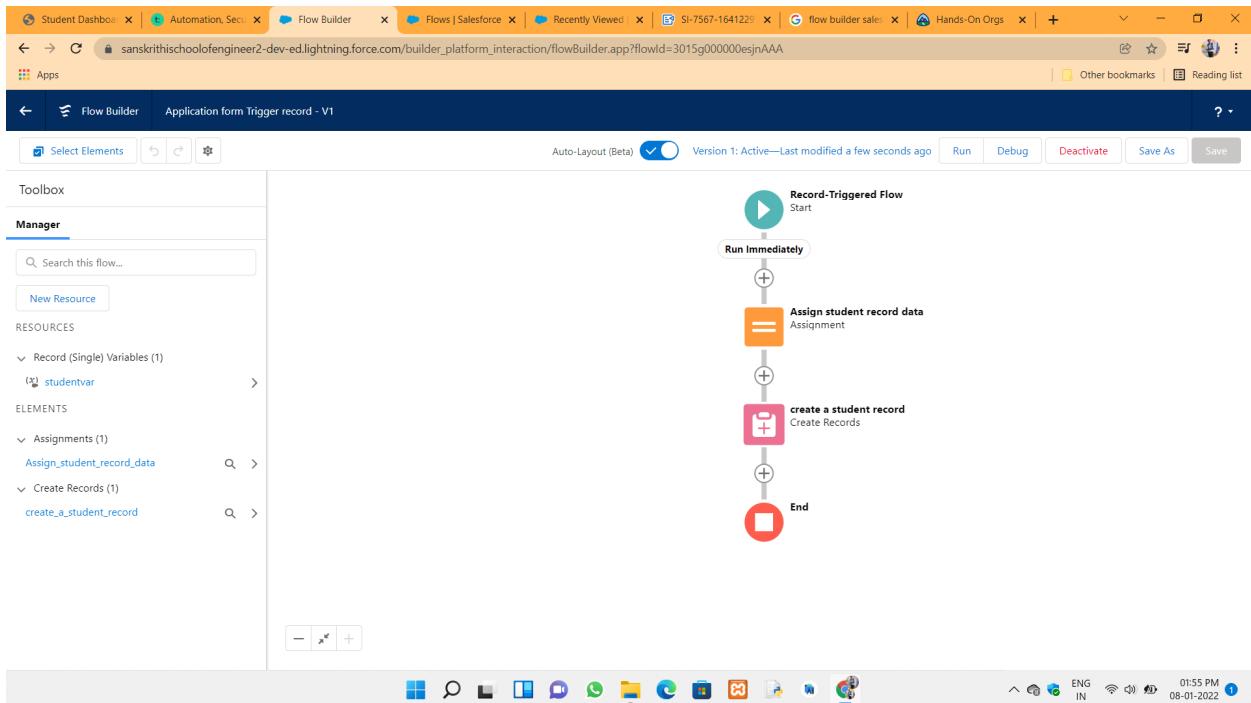


Record triggered flow selection and some process in that :

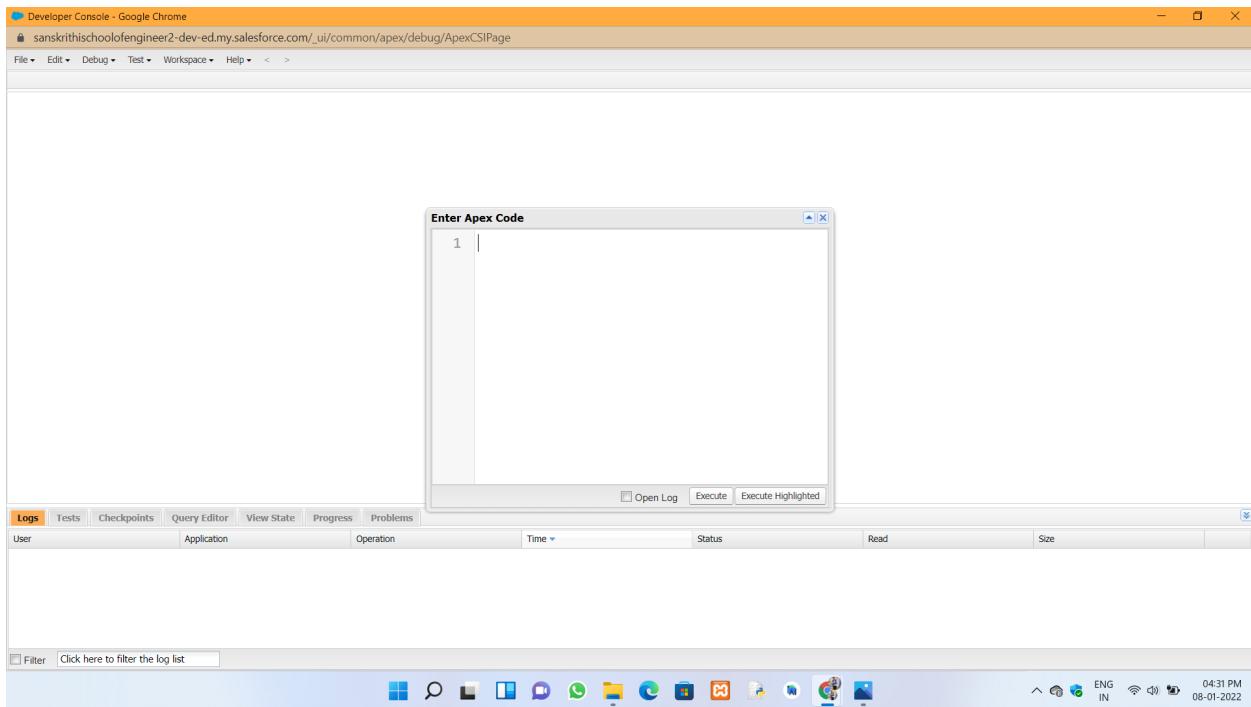




The overview of Record triggered flow is :



Overview of apex and some settings and datatypes discussed in this developer console :





Day 5 :

Topic :

Milestones / Activities :

Description :

