

Design and develop custom Application (Mini Project) using Salesforce Cloud.

- **Problem Definition:** Design and develop custom Application (Mini Project) using Salesforce Cloud.
- **Objective:** To create an custom application on Salesforce Lightning platform.
- **Software / Hardware Requirements:** OS - Windows / Ubuntu, Google Chrome.

- **Theory:**

1. Salesforce:

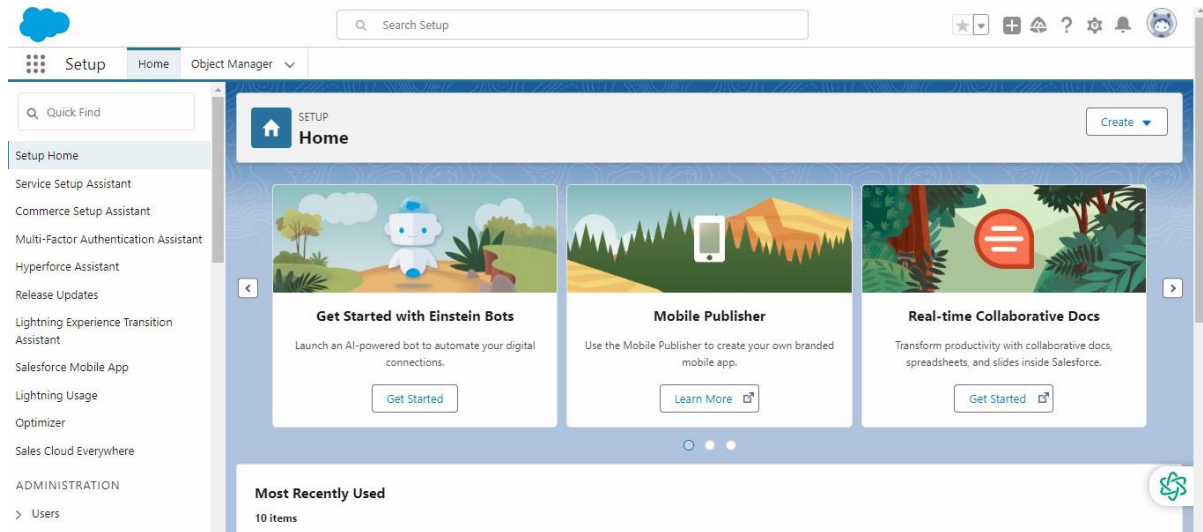
Salesforce is a cloud computing service as a software (SaaS) company that specializes in customer relationship management (CRM). Salesforce's services allow businesses to use cloud technology to better connect with customers, partners and potential customers. The software has become the number one for customer success and helps businesses track customer activity, market to customers and many more services. Salesforce is a [customer relationship management](#) solution that brings companies and customers together. It is one integrated CRM platform that gives all your departments — including marketing, sales, commerce, and service — a single, shared view of every customer.

2. Salesforce Lightning Experience:

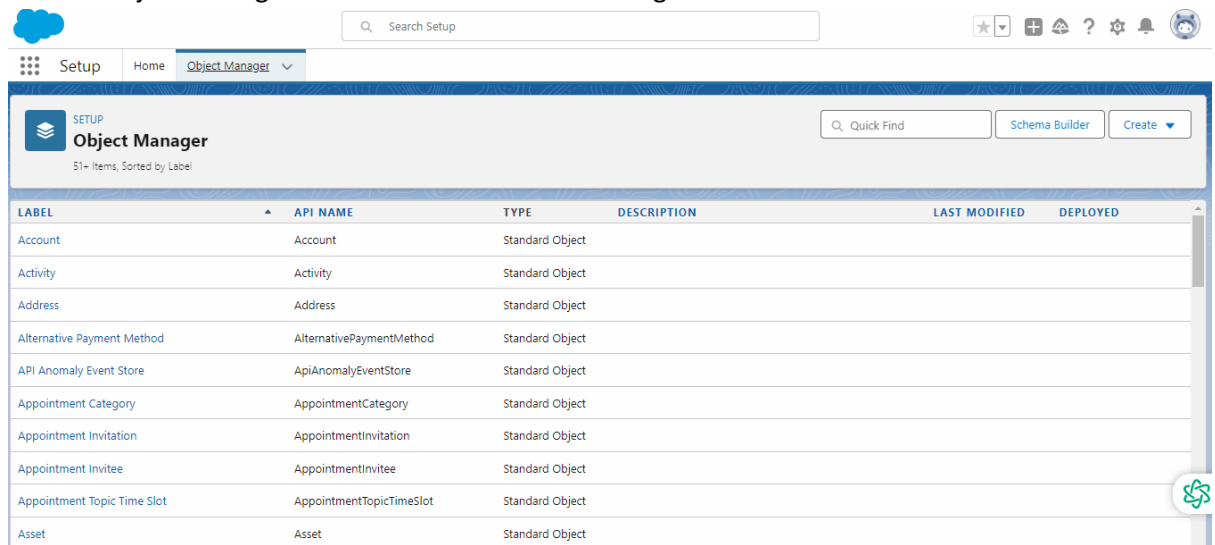
Salesforce Lightning Experience is simply referred to as “Lightning”. When working with lightning Salesforce we will learn about different Salesforce lightning topics like Lightning Login, Lightning App Builder, Lightning for Outlook, Salesforce Lightning Components, Lightning Sync and many more. Some of them are applicable in Lightning Experience only, but some others will work in both Lightning Experience and older Classic user interfaces. Lightning Sync is used to sync your user contacts and events between your email server with Salesforce.



1. Login to salesforce then home page will appear



2. Click on object manager and click on create menu at right corner



3. create custom object-It is like creating a table name.so create a stud as custom object.

SETUP **New Custom Object**

New Custom Object [Help for this Page](#)

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

4 At end click on save and new so it saves existing object and we can add many more object

5. I have created one more custom object **Read_Books**

6. Create a custom object .click on save and new

7. here we want to create 2 object so click on cancel

8. so read_Books_c means custom object is created

SETUP **Object Manager** **Read_Book**

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Details

Description
books are available

API Name
Read_Book_c

Custom
✓

Singular Label
Read_Book

Plural Label
Read_Books

Enable Reports

Track Activities

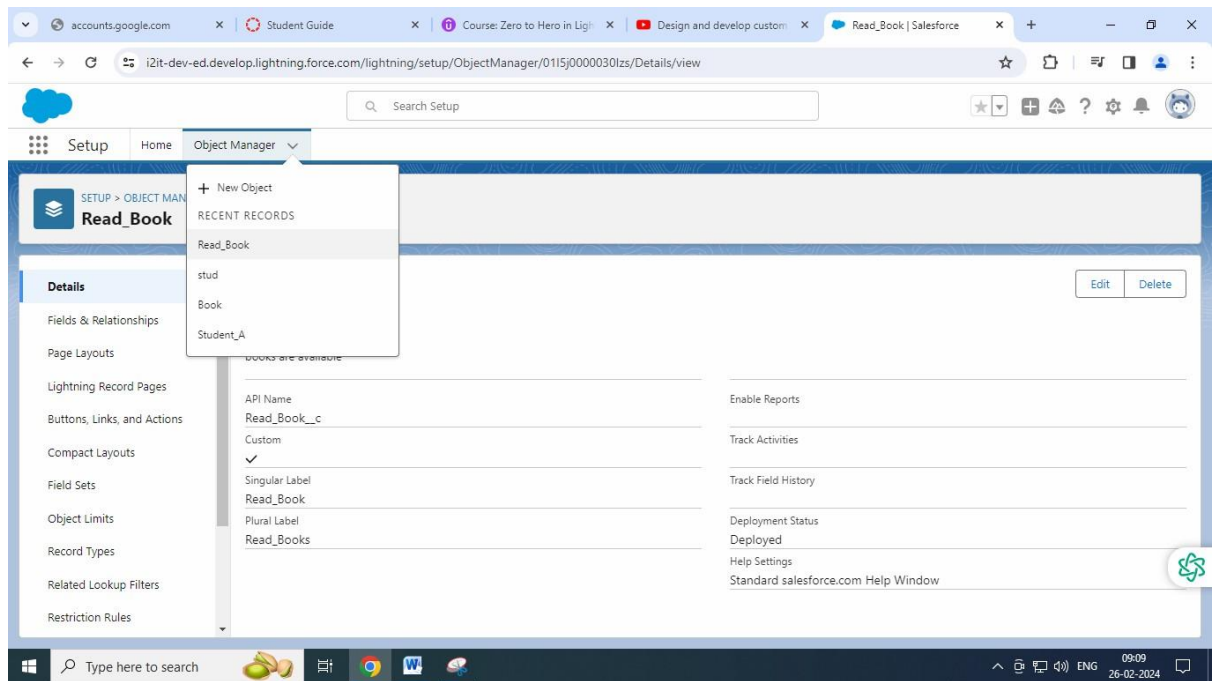
Track Field History

Deployment Status
Deployed

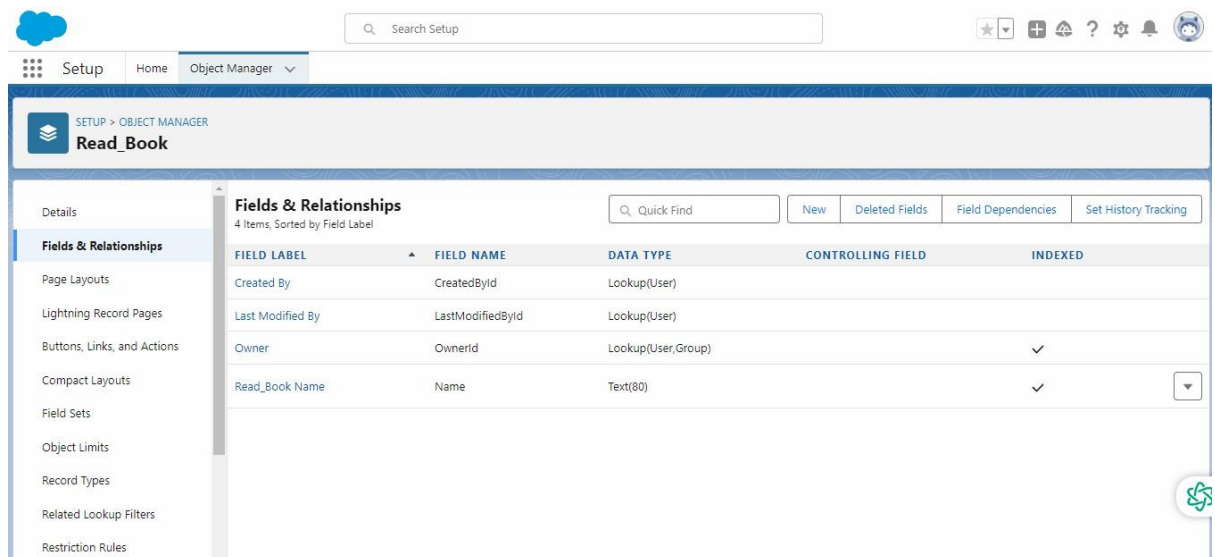
Help Settings
Standard.salesforce.com Help Window

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

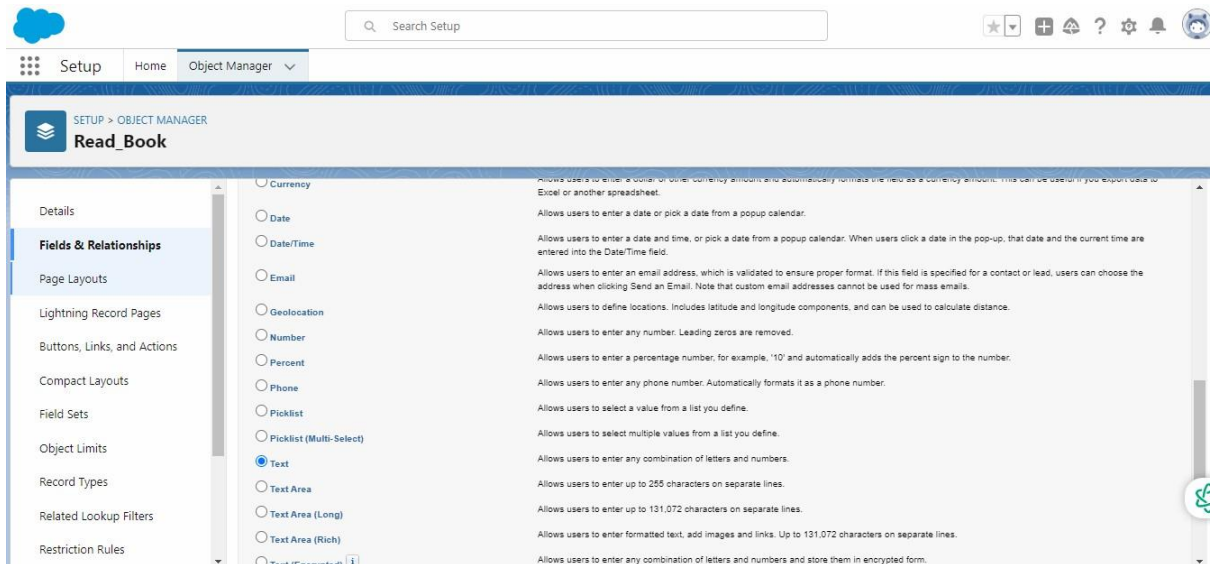
9. when you click on object manager there you can visualize two objects created



10. Then click at left side fields and relationship. It is like creating column name



11. click on new tab on same above page=> in new custom field select **text type**



12. then click next

The screenshot shows the Salesforce field configuration page for 'Auth_nm'. The page has a light gray background. At the top, there's a 'Field Label' section with a text input field containing 'Auth_nm' and an information icon. Below this is a 'Length' section with a text input field containing '30'. The 'Field Name' section has a text input field containing 'Auth_nm' and an information icon. The 'Description' section has a text area containing 'you can add author name'. The 'Help Text' section has a text area and an information icon. Below these sections are several checkboxes: 'Required' (checked), 'Unique' (unchecked), 'Treat "ABC" and "abc" as duplicate values (case insensitive)' (selected), 'Treat "ABC" and "abc" as different values (case sensitive)' (unchecked), 'External ID' (unchecked), and 'Add this field to existing custom report types that contain this entity' (checked). There are also information icons next to the 'Unique', 'Treat "ABC" and "abc" as different values (case sensitive)', and 'Add this field to existing custom report types that contain this entity' options.

13. Click on next=> click on next=> click on save and new

14. one more field I wanted to add so select text

Field Label [i](#)

Please enter the maximum length for a text field below.

Length

Field Name [i](#)

Description

Help Text [i](#)

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

custom report type ☒ Add this field to existing custom report types that contain this entity [i](#)

14. click on next=> next=>click on save

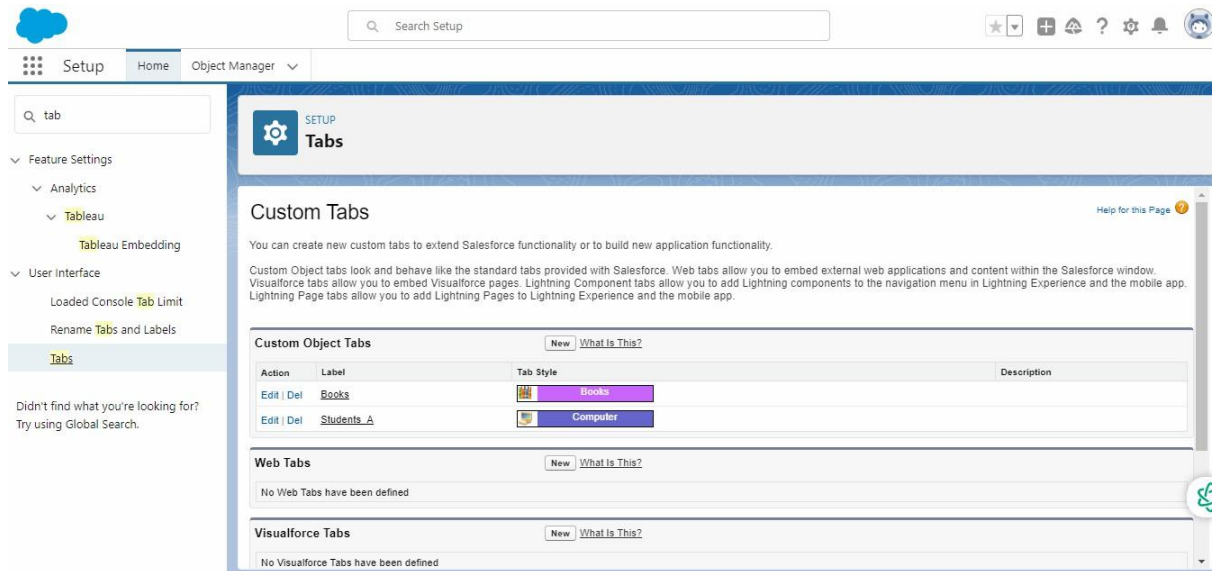
15. then following page looks like this

Fields & Relationships				
6 Items, Sorted by Field Label				
<input type="text" value="Quick Find"/> New Deleted Fields Field Dependencies S				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Auth_nm	Auth_nm__c	Text(30)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
publish	publish__c	Text(30)		
Read_Book Name	Name	Text(80)		✓

16. select stud in object manager and add fields here as class => select text field => write field name "class" => next => save

17. now create the tab click on "setup"

18. at left side search for tab



19. In tab style choose whatever object you created Read_book

And stud select style for these

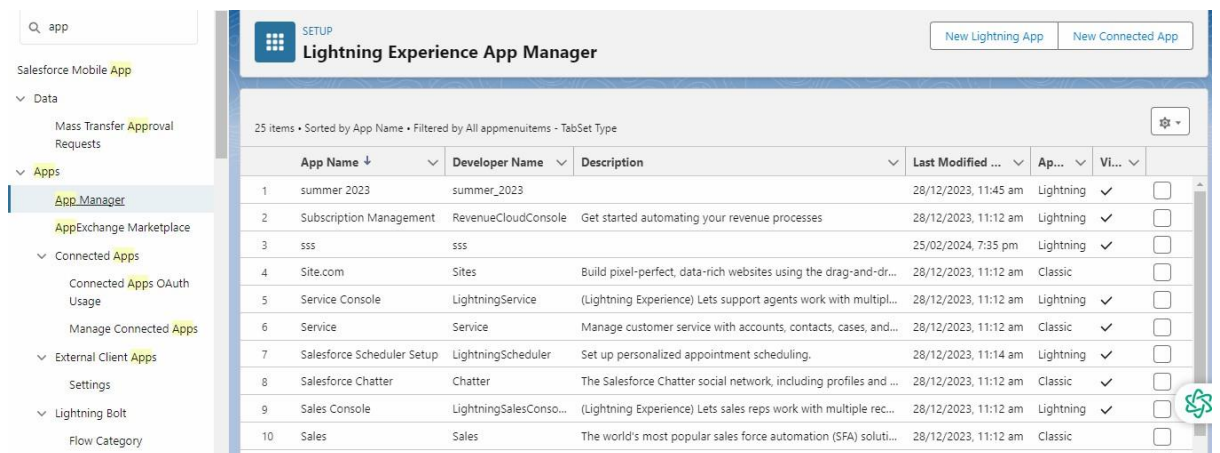
Here select object and tab style => click on next=>click on next=>save

Again do it for stud object

select object stud and tab style => click on next=>click on next=>save

20 create app

Click on setup at right corner=> search app=>click on app manager=> click on new lightning app



21. give a name to app

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name ⓘ

Name your app...

* Developer Name ⓘ

Enter a developer name...

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

#0070D2

Oro Theme Options

Next

22. add fields in above frame

New Lightning App

App Details

* App Name ⓘ

LMS

* Developer Name ⓘ

LMS

Description ⓘ

library

App Branding

Image ⓘ

Clear

Primary Color Hex Value ⓘ

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

23 click on next

New Lightning App

App Options

Navigation and Form Factor ⓘ

* Navigation Style

- ☒ Standard navigation
- ☐ Console navigation

* Supported Form Factors

- ☒ Desktop and phone
- ☐ Desktop
- ☐ Phone

Setup and Personalization ⓘ

Setup Experience

- ☒ Setup (full set of Setup options)
- ☐ Service Setup

App Personalization Settings

- ☐ Disable end user personalization of nav items in this app
- ☐ Disable temporary tabs for items outside of this app
- ☐ Use Omni-Channel sidebar

24. Again click on next

New Lightning App

Utility Items (Desktop Only)

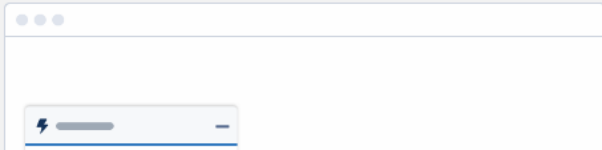
Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item

Utility Bar Alignment ⓘ

Default ▼

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.



25. click next

26. add tabs for your application


27.

New Lightning App


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



Selected Items

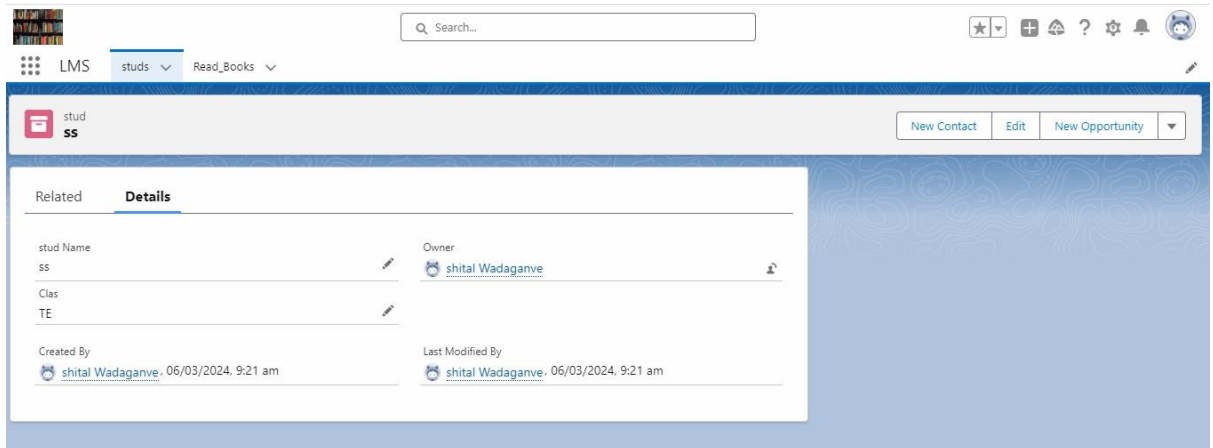
 studs

 Read_Books

28. in user profiles select system administrator

Save and finish

29. to see application created => click on app launcher => search your application LMS



The screenshot displays the LMS (Learning Management System) interface. At the top, there is a search bar labeled "Search..." and a navigation bar with "LMS", "studs", and "Read_Books". The main content area shows a user profile for "stud SS". The profile is divided into two tabs: "Related" and "Details". The "Details" tab is active, showing the following information:

Field	Value
stud Name	ss
Owner	shital Wadaganve
Class	TE
Created By	shital Wadaganve, 06/03/2024, 9:21 am
Last Modified By	shital Wadaganve, 06/03/2024, 9:21 am