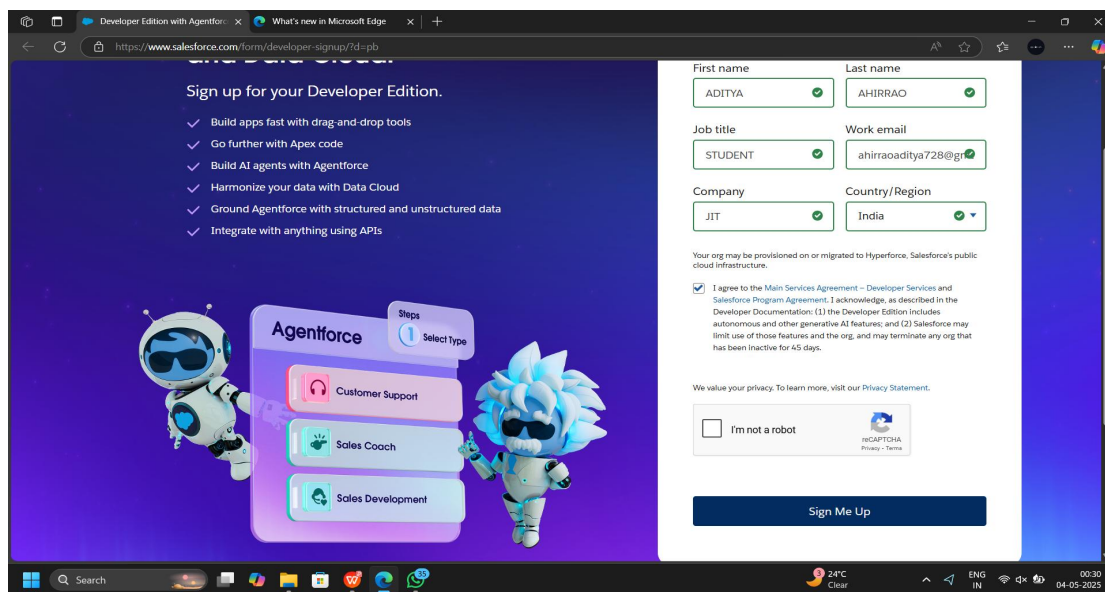


## CC PRACTICAL 03

### ❖ STEP 1 :

Create agent account - <https://developer.salesforce.com/signup>

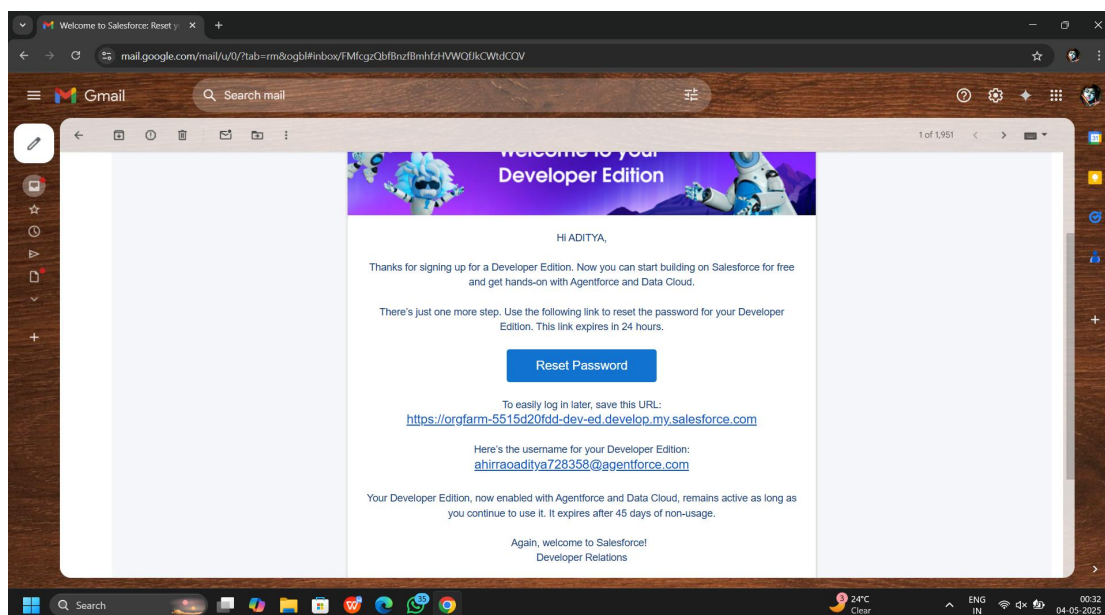
(Create the account before practical because the user name is sent on email )



The screenshot shows the Salesforce Developer Edition signup page. On the left, there's a list of benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", "Ground Agentforce with structured and unstructured data", and "Integrate with anything using APIs". Below this is an illustration of two robots, one with a speech bubble that says "Agentforce" and lists "Steps: 1 Select Type", "Customer Support", "Sales Coach", and "Sales Development". On the right, there's a form with fields for "First name" (ADITYA), "Last name" (AHIRRAO), "Job title" (STUDENT), "Work email" (ahirraoaditya728@gmail.com), "Company" (JIT), and "Country/Region" (India). There's a checkbox for "I agree to the Main Services Agreement" and a "Sign Me Up" button at the bottom.

### ❖ STEP 2 - Check Email

Check your email (The user name is second blue link like line in email)



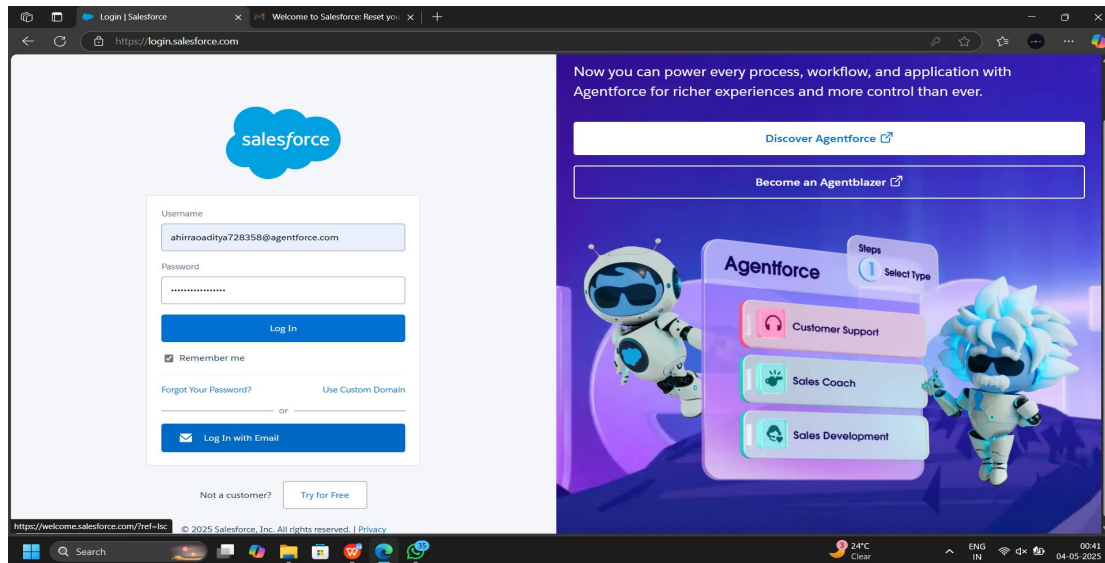
- **If you are newly creating :**

Here, firstly, click on the “RESET PASSWORD “ as we have not set the password yet .  
Then set your password.

- **If already created :**

Log in via - <https://login.salesforce.com/>

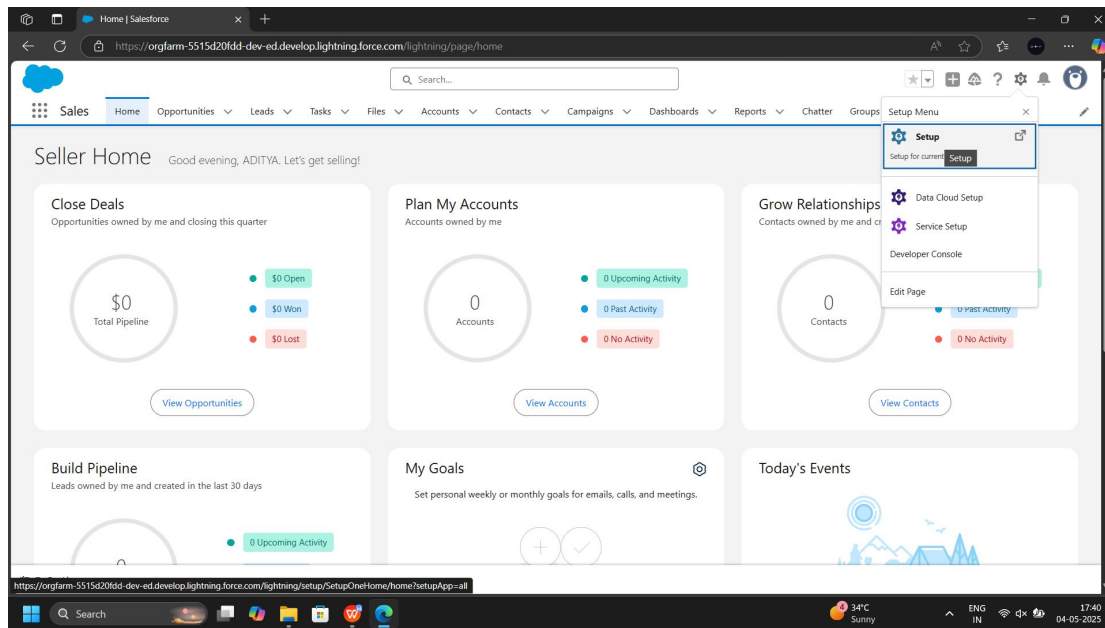
Insert user name and password and log in in your account.



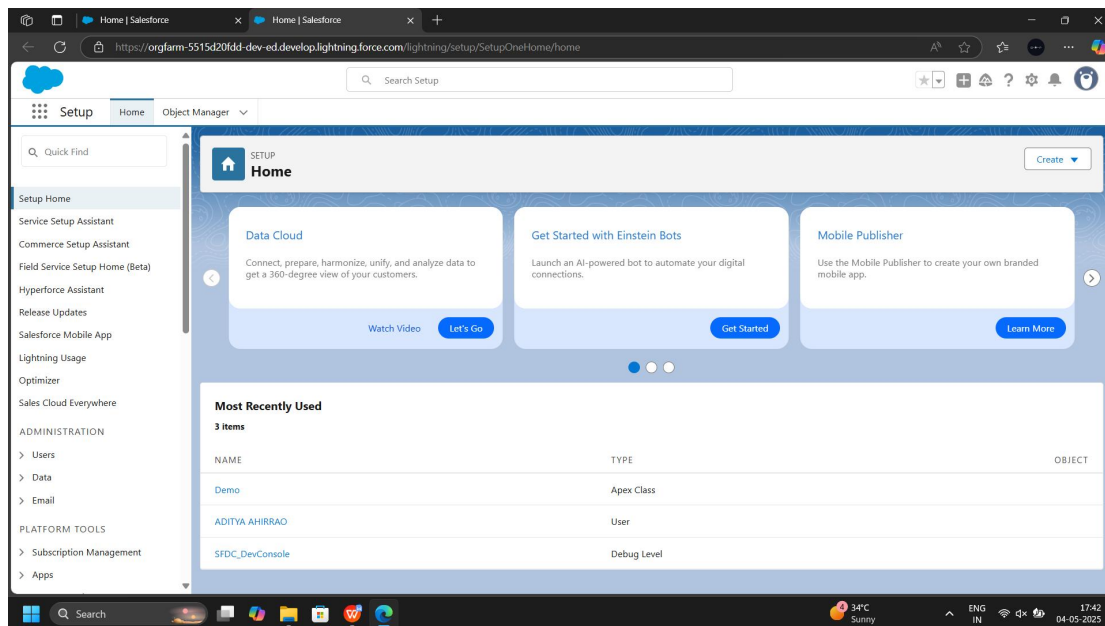
➤ **NOTE :**

( REMEMBER THAT USER NAME ARRIVES IN EMAIL, AND WHILE CREATING ACCOUNT AS IN STEP 1, IT DOES NOT ASKS PASS WORD, SO BY RESETTING PASSWORD YOU WILL CREATE YOUR PASS WORD INDIRECTLY AND WHEN YOU SUCCESSFULLY CREATE THE PASSWORD YOU WILL AUTOMATICALLY REDIRECTED TO HOME PAGE, OR ELSE LOGIN VIA - <https://login.salesforce.com/> VERIFY THE USER NAME AND RESPECTIVE PASSWORD AND YOU WILL BE REDIRECTED TO HOME PAGE )

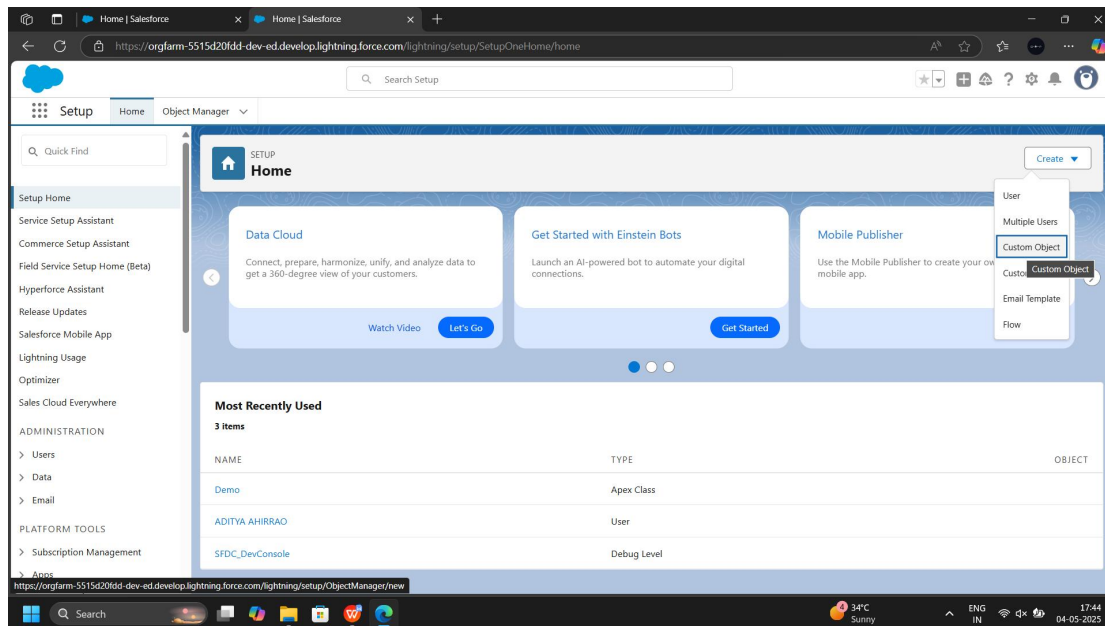
## ❖ STEP 2 :



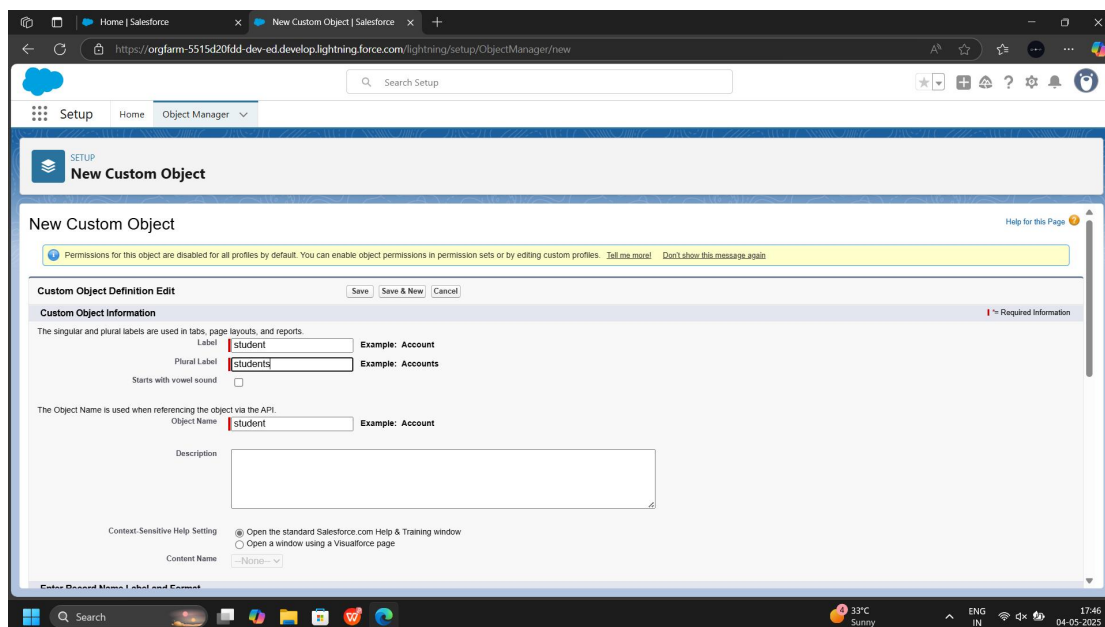
Click on Set up, you will be redirected to lightning page



### ❖ STEP 3 : Create Custom Object



### ❖ STEP 4 : Now fill the Label with any word and Plural with its grammatical plural. (For ex : Label - account ; Plural - accounts )



## ❖ STEP 5 :

Now object name, record name and data type will get filled automatically.

If not, then fill as follows :

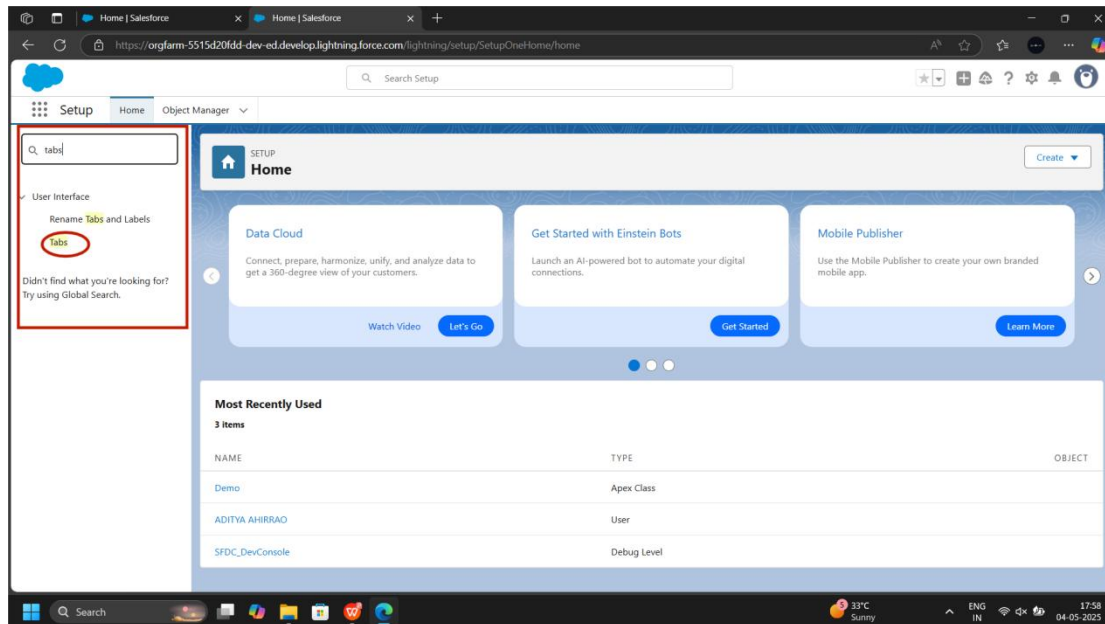
1. **Record name** - your\_word Name (Note that ' your\_word ' is the word which you are going to use in label and plurals above )

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and has a search bar at the top. The main content area contains several sections:

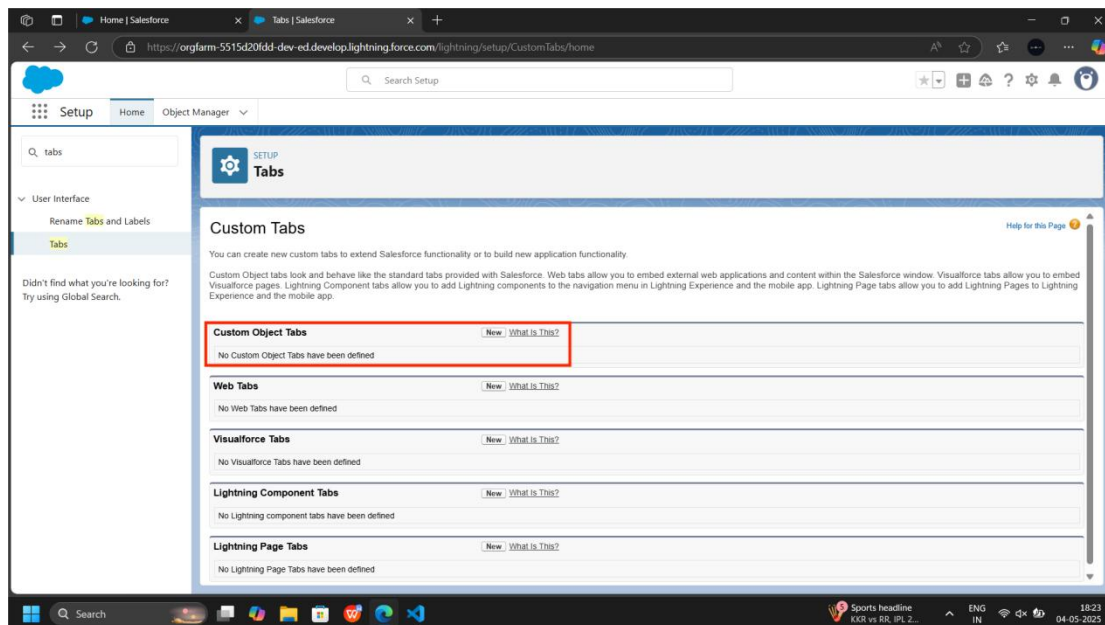
- Plural Label:** A text input field with 'students' entered. An example 'Accounts' is shown.
- Object Name:** A text input field with 'student' entered. An example 'Account' is shown.
- Description:** A large text area for describing the object.
- Context Sensitive Help Setting:** Two radio buttons. The first is selected: 'Open the standard Salesforce.com Help & Training window'. The second is 'Open a window using a Visualforce page'.
- Content Name:** A dropdown menu with 'None' selected.
- Enter Record Name Label and Format:** A section with a text input field containing 'student Name'. An example 'Account Name' is shown. Below the input field, it says: 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.'
- Data Type:** A dropdown menu with 'Text' selected. A warning message says: 'Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.'
- Optional Features:** A section with three checkboxes: 'Allow Reports', 'Allow Activities', and 'Track Field History'.

2. **Select Data Type - Text ; Tick on - Allow reports and Save .**

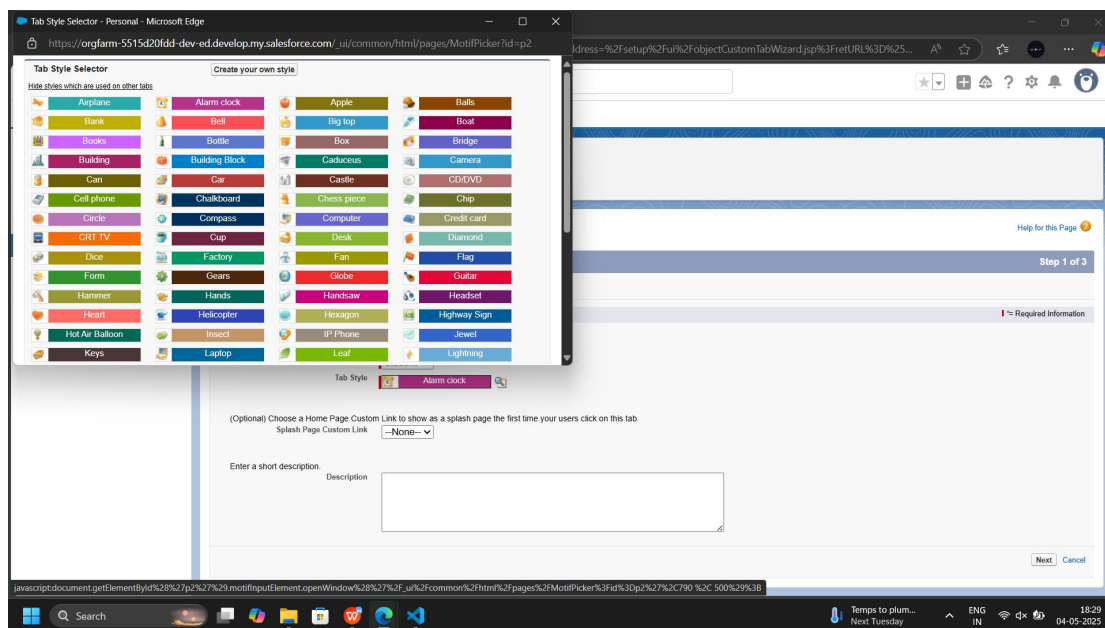
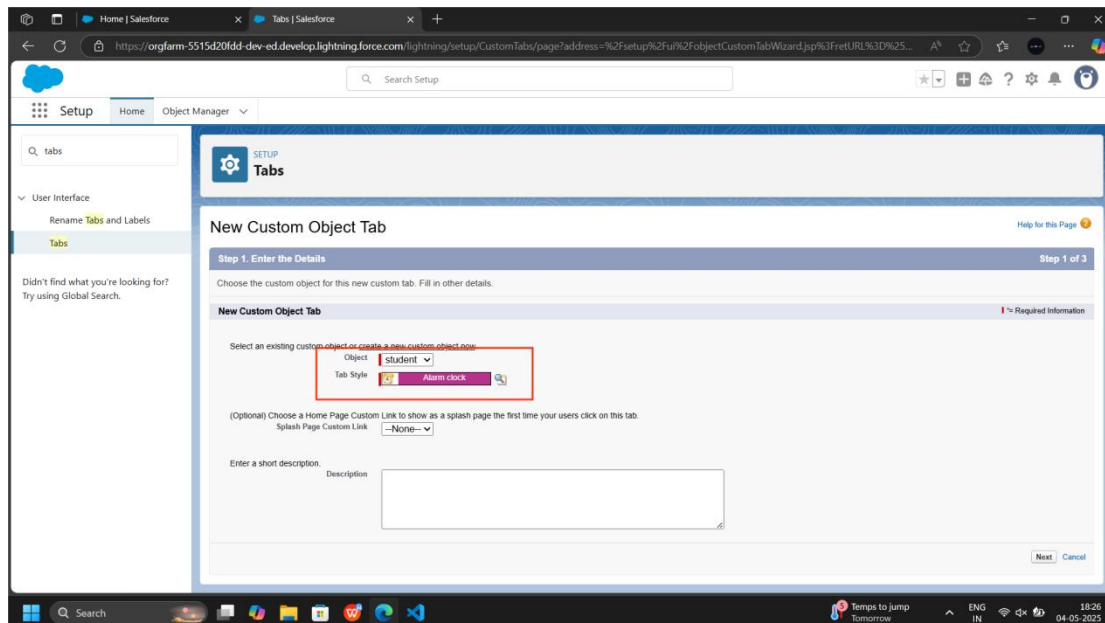
- ❖ **STEP 6 : Click on home page and in quick find search box at left, search Tabs**



- ❖ **STEP 7 : Click on new in Custom Object Tabs**



- ❖ **STEP 8 :** Select the object from the drop down menu, the object will be visible which we created previously. Also, any random tab style to it.

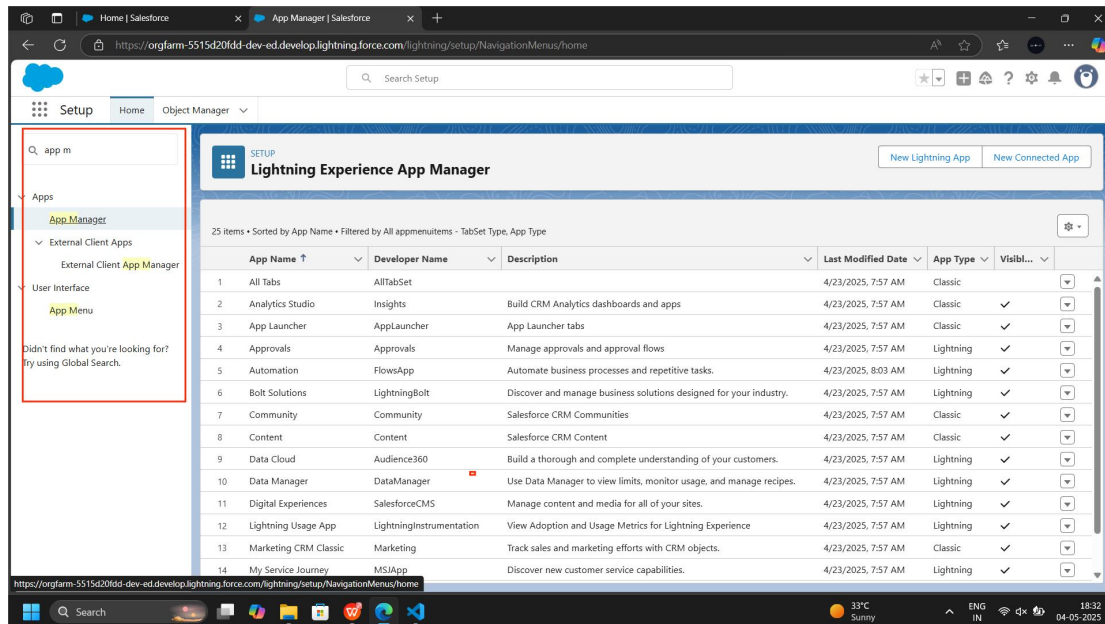


Tab styles

After that, at bottom, click Next --> Next --> Save



## ❖ STEP 9 : Go to quick search and search “App Manager”

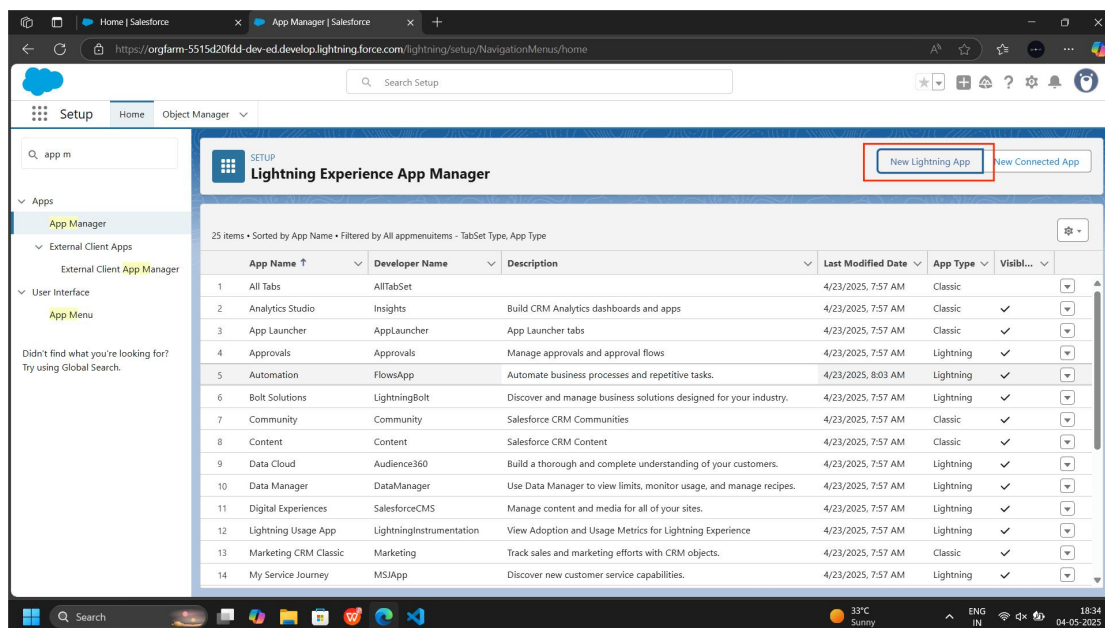


Setup Lightning Experience App Manager

25 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visibl...
1 All Tabs	AllTabSet		4/23/2025, 7:57 AM	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	4/23/2025, 7:57 AM	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	4/23/2025, 7:57 AM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	4/23/2025, 7:57 AM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	4/23/2025, 8:03 AM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	4/23/2025, 7:57 AM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	4/23/2025, 7:57 AM	Classic	✓
8 Content	Content	Salesforce CRM Content	4/23/2025, 7:57 AM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	4/23/2025, 7:57 AM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	4/23/2025, 7:57 AM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	4/23/2025, 7:57 AM	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	4/23/2025, 7:57 AM	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	4/23/2025, 7:57 AM	Classic	✓
14 My Service Journey	MSJApp	Discover new customer service capabilities.	4/23/2025, 7:57 AM	Lightning	✓

## ❖ STEP 10 : Click on “New Lightning App”



Setup Lightning Experience App Manager

New Lightning App New Connected App

25 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified Date	App Type	Visibl...
1 All Tabs	AllTabSet		4/23/2025, 7:57 AM	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	4/23/2025, 7:57 AM	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	4/23/2025, 7:57 AM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	4/23/2025, 7:57 AM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	4/23/2025, 8:03 AM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	4/23/2025, 7:57 AM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	4/23/2025, 7:57 AM	Classic	✓
8 Content	Content	Salesforce CRM Content	4/23/2025, 7:57 AM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	4/23/2025, 7:57 AM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	4/23/2025, 7:57 AM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	4/23/2025, 7:57 AM	Lightning	✓
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	4/23/2025, 7:57 AM	Lightning	✓
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	4/23/2025, 7:57 AM	Classic	✓
14 My Service Journey	MSJApp	Discover new customer service capabilities.	4/23/2025, 7:57 AM	Lightning	✓



## ❖ STEP 11 : Give only name to the app and click NEXT --> NEXT --> NEXT

**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 <sup>?</sup>  
Aditya

\*Developer Name <sup>?</sup>  
Aditya

Description <sup>?</sup>  
Enter a description...

**App Branding**

Image <sup>?</sup>  


Primary Color Hex  
Value <sup>?</sup>  
#007002

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

**Next**

App Name	App Description	App Type	App Status	App Version	App Category
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	4/23/2025, 7:57 AM	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	4/23/2025, 7:57 AM	Classic	✓
My Service Journey	MSJApp	Discover new customer service capabilities.	4/23/2025, 7:57 AM	Lightning	✓

## ❖ STEP 12 : Select Accounts, and Communication labels

**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**

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

**Selected Items**

- Contacts
- Accounts
- Communication Subscription Channel Types

## SELECT PROFILE AS SYSTEM ADMINISTRATOR

Then Save & Finish



The image shows a software interface titled "User Profiles" with the instruction "Choose the user profiles that can access this app." It features two main panels: "Available Profiles" on the left and "Selected Profiles" on the right. The "Available Profiles" panel has a search bar containing the text "sy". The "Selected Profiles" panel lists "System Administrator". Between the panels are two buttons: a right-pointing arrow and a left-pointing arrow. At the bottom right, there is a blue button labeled "Save & Finish". The interface is presented within a window frame with a vertical scrollbar on the right and a horizontal scrollbar at the bottom.

User Profiles

Choose the user profiles that can access this app.

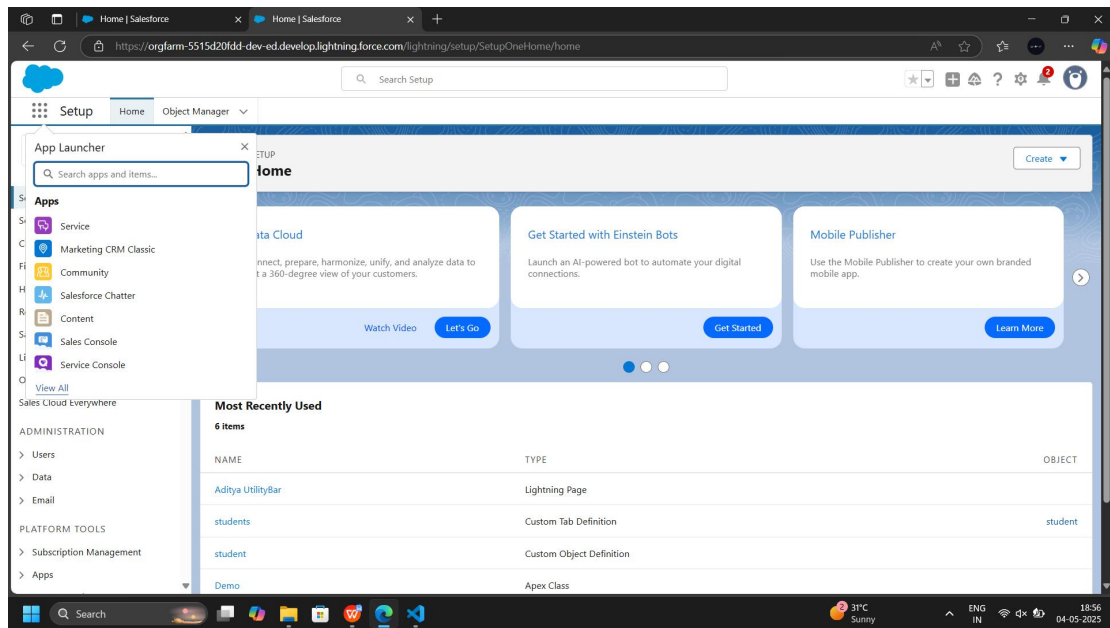
Available Profiles

Selected Profiles

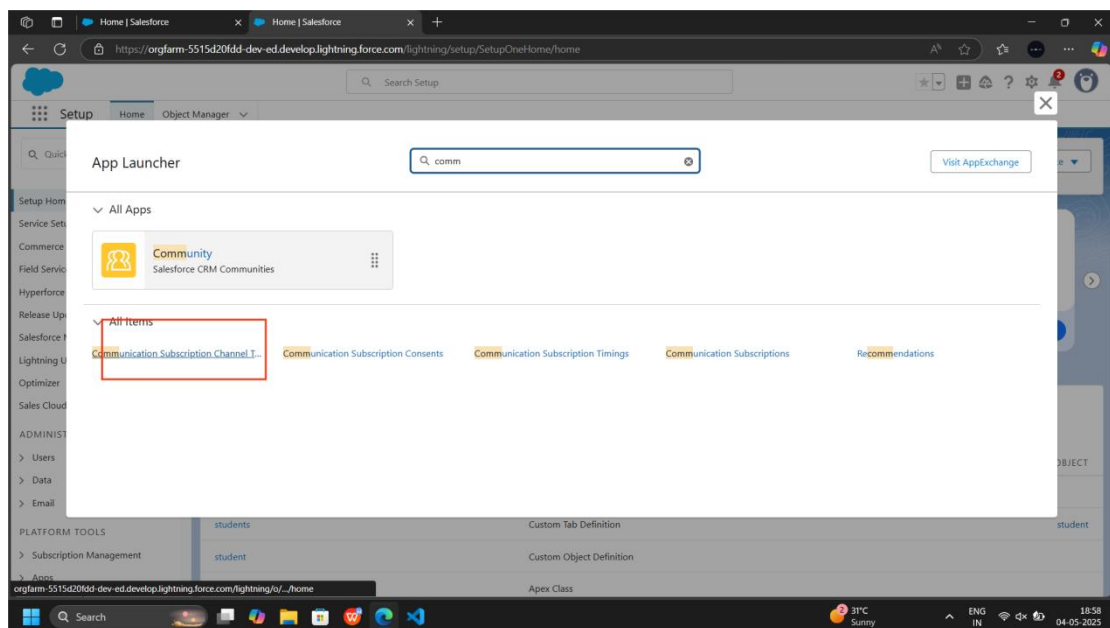
System Administrator

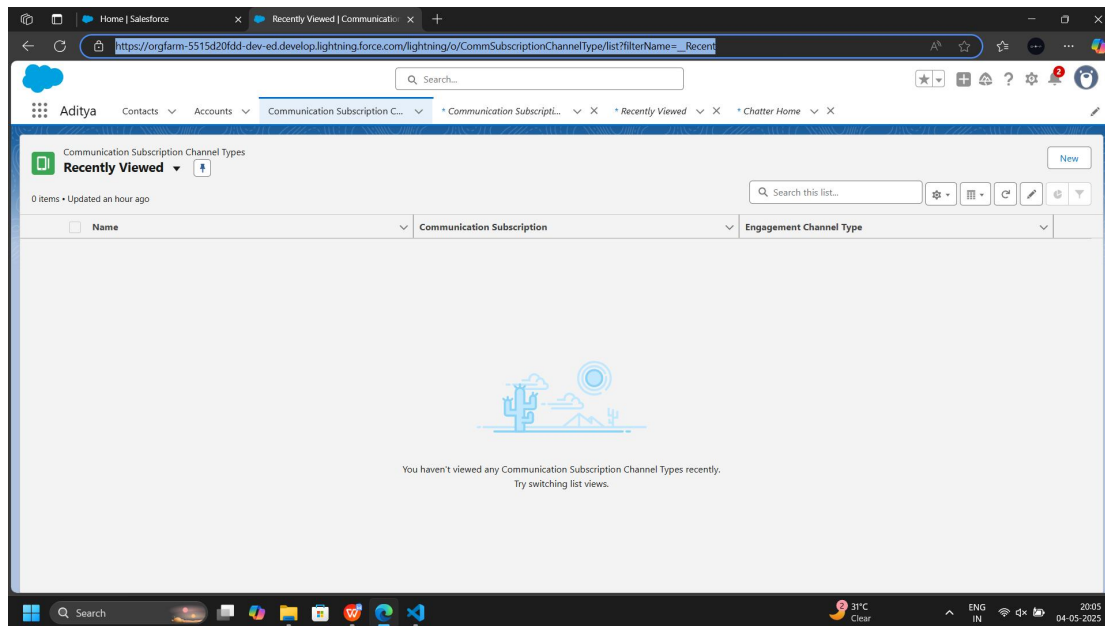
Save & Finish

❖ **STEP 13 :** Go to Home and Click to left as in figure, and click View All



Search communication and select the boxed item





## SELECT ACCOUNT OPTION

