

- Retail Management Application Using Salesforce (DEVELOPER)

## Retail Management Application Using Salesforce (DEVELOPER)

Retailing encompasses the business activities involved in selling goods and services to consumers for their personal, family, or household etc. A CRM product owner has requested to create two applications, one is a sales app for sales reps to use this application and store customers data, and the second application is a service app for service reps/agents to provide support to customers in dealing cases. To generate business on top of the customers.

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## Introduction & Creation Salesforce Org

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

### What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard Products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your Contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

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## Object

Objects are database table that permit you to store data that is specific to an organization. Salesforce objects are of two types: 1) Standard objects, 2) Custom objects.

1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. Custom Objects: Custom objects are those objects that are created by users. They supply information

that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Objects involved in retail management are:

Application	Object	Description
Sales app	Campaign	We do promotions by using this object
	Lead	We capture leads here
	Account	We capture customers data
	Contact	Employees data of customer
	Opportunity	SMB sales orders data
	Product	Here we store product details i.e electronic types
	Warehouse	We capture stocks data
	Sales order	This is an actual order which has invoice details
	Dispatch/Tracking	Orders dispatch related info will be stored here
Service app	Case	Historical problems of customers will be stored here
	Account	We captures customers data

We need to create these objects -

1. Warehouse
  2. Sales order
  3. Dispatch/Tracking
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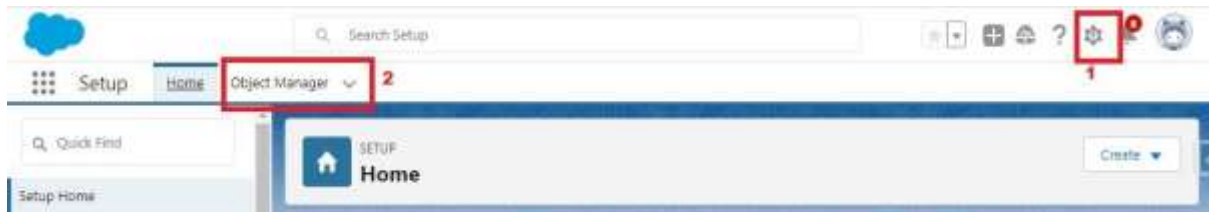
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## Creation Of Warehouse Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Warehouse
6. Plural Label: Warehouses
7. Record Name: Warehouse Name
8. Check the Allow Reports checkbox
9. Check the Allow Search checkbox
10. Click Save.

In the same way create **2** more objects as Sales order, Dispatch/Tracking.

**Note** – While making **Sales order** Object select data type “**Auto Number**” & Record Name- “Sales order Number” in “Enter Record Name Label and Format” Section.



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

Label	<input type="text" value="Warehouse"/>	Example: Account
Plural Label	<input type="text" value="Warehouses"/>	Example: Accounts

Starts with a word sound:

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

Object Name:  Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window  
☐ Open a window using a Visualforce page

Content Name:

**Enter Record Name Label and Format**

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 in the API.

Record Name:  Example: Account Name

Data Type:

**Optional Features**

☒ Allow Reports  
☐ Allow Archives  
☐ Track Field History

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

**Object Creation Options (Available only when custom object is first created)**

☐ Add Notes and Attachments related list to default page layout  
☐ Launch New Custom Tab Wizard after saving this custom object.

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## What Is A Tab?

Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

There are mainly 4 types of tabs:

1. Standard Object Tabs: Standard object tabs display data related to standard objects
2. Custom Object Tabs: Custom object tabs displays data related to custom objects.
3. Web Tabs: Web Tabs display any external Web-based application or Web page in a Salesforce tabs.
4. Visualforce Tabs: Visualforce Tabs display data from a Visualforce Page.

- **Project Workspace**

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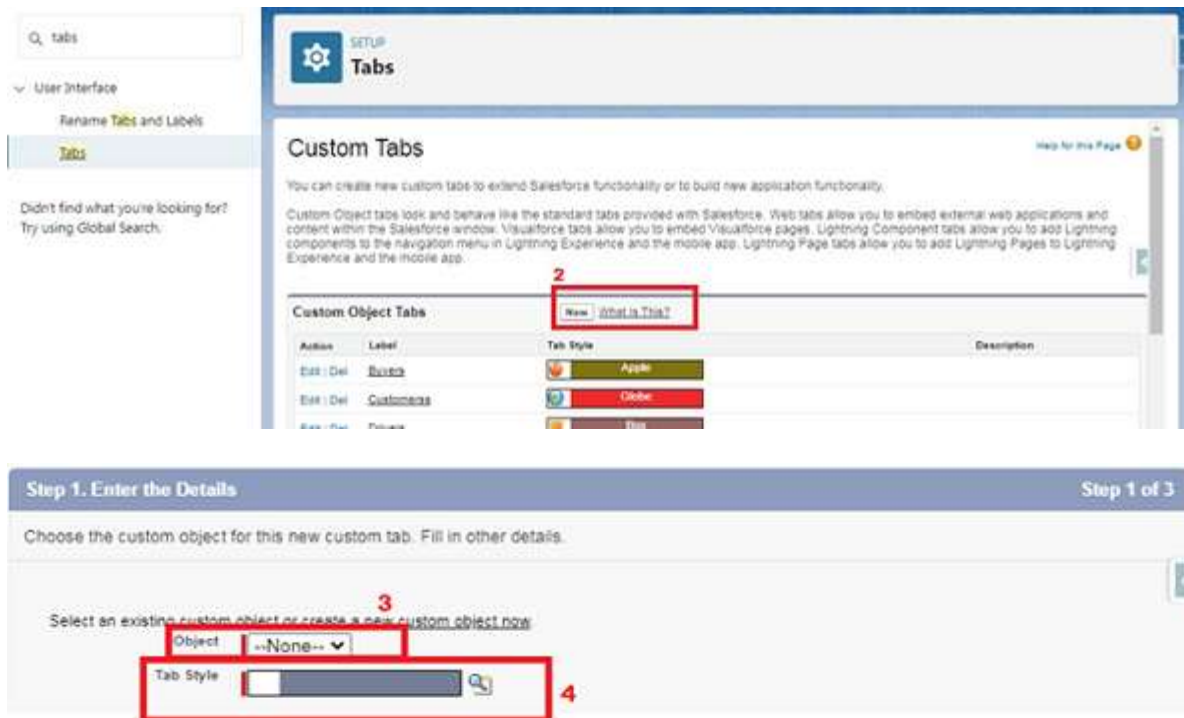
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## Create A Tab For Warehouse Object

Now create a custom tab. Click the Home tab.

1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Warehouse.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects – Sales order, Dispatch /Tracking.





**Note: The description, Logo, and Label of standard app cannot be altered.**

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## What Is An App

**Custom Apps:** Custom apps are created according to need of user. Custom Apps are made by using standard and custom tabs together.

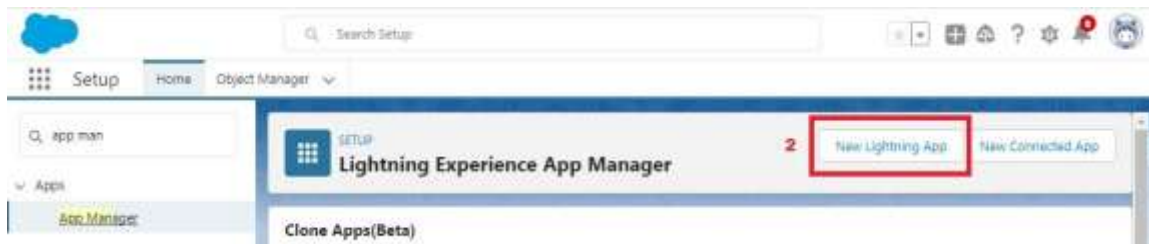
**Note: Logos for Custom Apps can be changed.**

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## Create The Sales App

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.
3. Enter Sales App as the App Name, then click Next
4. Under App Options, leave the default selections and click Next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Campaign, Leads, Accounts, Contacts, Opportunities, Products, Warehouse, Sales order, Dispatch/Tracking, Reports, and Dashboards and move them to Selected Items. Click Next.
7. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.



### 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 3


\*App Name ⓘ  
Sales App

\*Developer Name ⓘ  
Sales\_App

Description ⓘ  
Enter a description...

#### App Branding

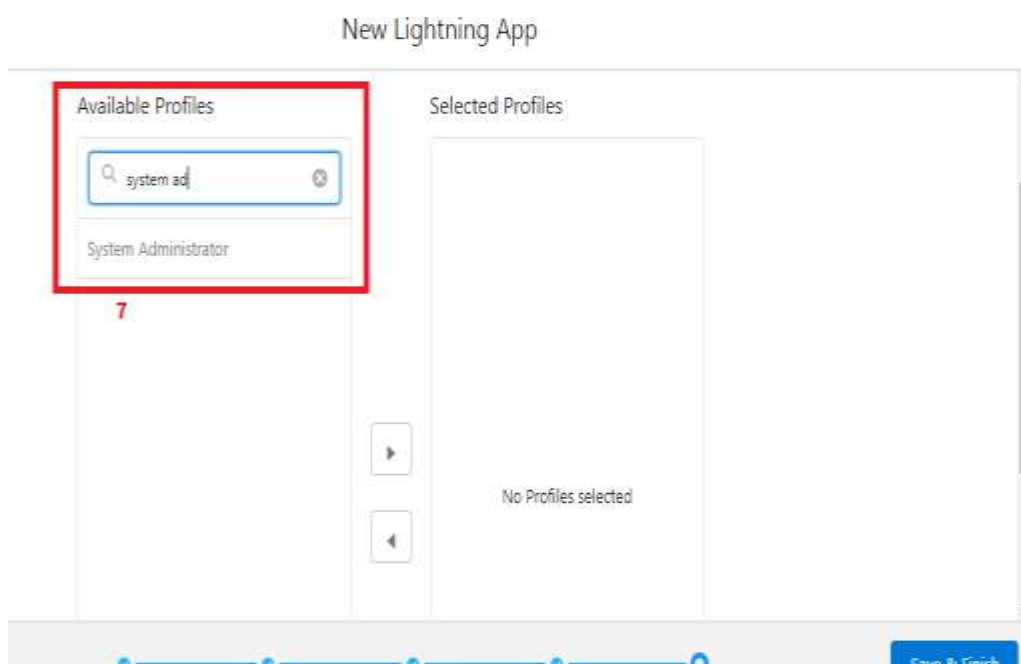
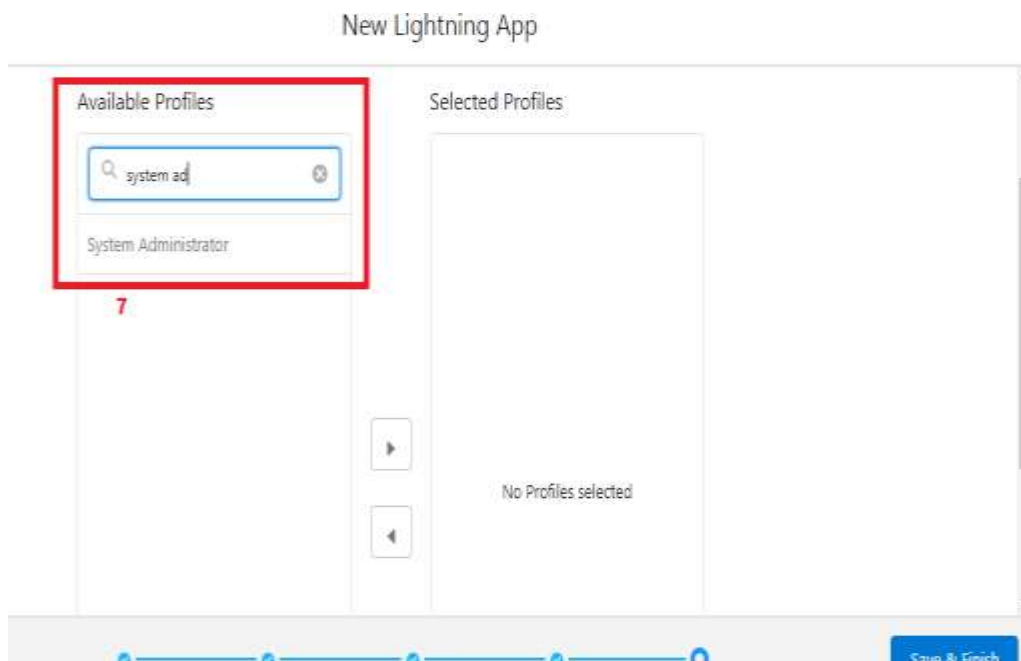
Image ⓘ  
  
Upload

Primary Color Hex Value ⓘ  
 #0070C2

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

Progress bar with 5 steps, step 1 is active.

Next



Note – Similarly create **Service App**.

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## Fields And Relationship

**Fields** - Fields store data values that are required for a particular object in a record.

An object relationship in Salesforce is **a two-way association between two objects**. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

These are fields and their data types we need to create make them one by one –

Object	Fields	Datatype
Contact	Account website	Lookup (Cross Object Formula field)
Warehouse	Address	Text Area
	Location	Text (50)
Sales Order	Status	Picklist
	Customer	Lookup (Account)
	Contact	Lookup (contact)
	Order date	Date
Dispatch/Tracking	Dispatched	Checkbox
	Tracking ID	Text
	Sales Order	Master Detail (Sales Order)

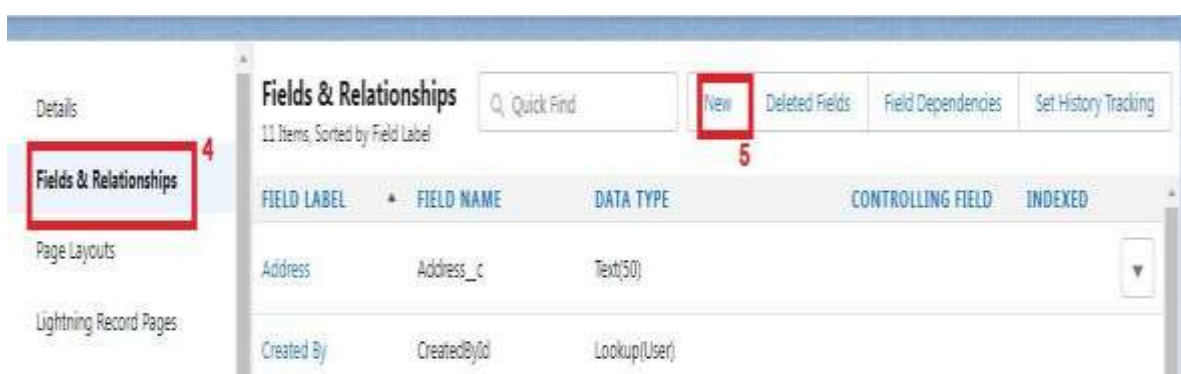
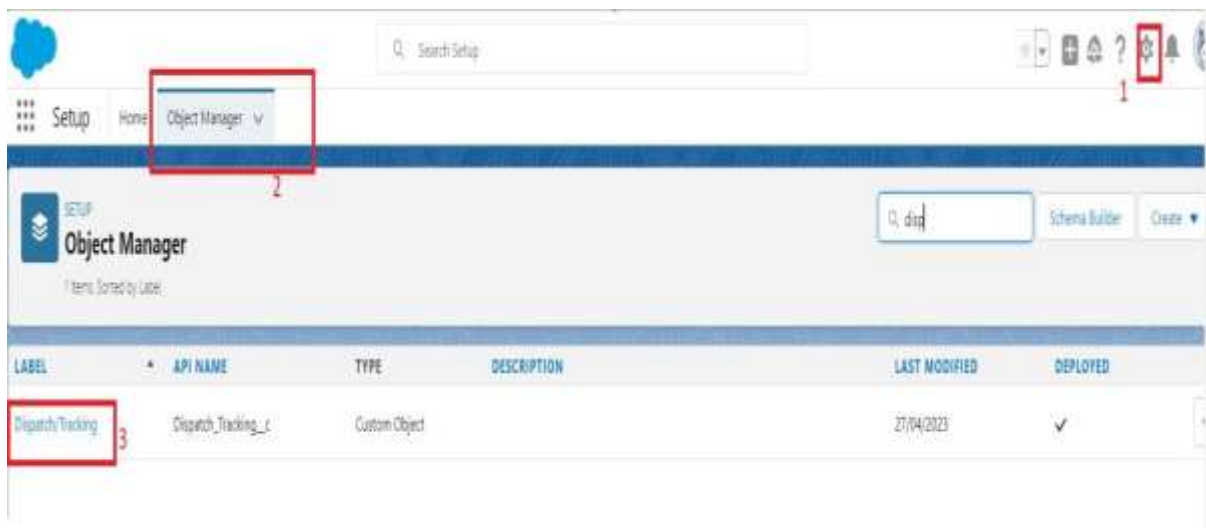
	Expected date of delivery	Date
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# Creation Of Fields For The Dispatch/Tracking Object

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Dispatch/Tracking
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Text as the Data Type, click Next.
7. For Field Label, enter Tracking ID & length = 40.
8. Click Next, Next, then Save & New.



Field type selection dialog:

- ☐ Number: Allows users to enter any number. Leading zeros are removed.
- ☐ Percent: Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- ☐ Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- ☐ Picklist: Allows users to select a value from a list you define.
- ☐ Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- ☒ **Text** 6: Allows users to enter any combination of letters and numbers.
- ☐ Text Area: Allows users to enter up to 255 characters on separate lines.
- ☐ Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- ☐ Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- ☐ Text (Encrypted) i: Allows users to enter any combination of letters and numbers and store them in encrypted form.
- ☐ Time: Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.
- ☐ URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Next Cancel

Field configuration dialog:

Field Label:  i

Please enter the maximum length for a text field below.

Length:

Field Name:  i

Description:

Help Text:  i

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Now let's create the other fields and **we must choose the data types of the fields carefully**. Let's have a look at it.

Similarly create fields for **Warehouse** object- Address, Location select datatype according table.

Similarly create fields for **Dispatch/Delivery** object- Dispatched, Expected date of delivery select datatype according table.

**Xx**

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## Create A Master-Detail Relationship On Dispatch/Delivery Object

Follow steps 1 to 5 of field creation then follow below steps.

1. Select Master-Detail Relationship as the Data Type and click Next.

2. For Related to, enter Sales order.
3. Click Next.
4. For Field Label, enter Sales order.
5. Click Next, Next, Next and Save.

Formula

Roll-Up Summary 

Lookup Relationship

**Master-Detail Relationship**

1

source fields change.

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.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Dispatch/Tracking

New Relationship

Help for this Page 

Step 2: Choose the related object

Step 2 of 6

Previous Next Cancel

Select the other object to which this object is related.

Related To: Sales order


2

Previous Next Cancel

3

Dispatch/Tracking

New Relationship

Help for this Page 

Step 3: Enter the label and name for the lookup field

Step 3 of 6

Previous Next Cancel

Field Label: Sales order

4

Field Name: Sales\_order

5

Description:

Help Text:

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## Create A Master-Detail Relationship On Dispatch/Delivery Object

Follow steps 1 to 5 of field creation then follow below steps.

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter Sales order.
3. Click Next.
4. For Field Label, enter Sales order.
5. Click Next, Next, Next and Save.

The screenshot shows the 'Formula' tab in the field creation wizard. It lists three options: 'Roll-Up Summary', 'Lookup Relationship', and 'Master-Detail Relationship'. The 'Master-Detail Relationship' option is selected and highlighted with a red box, with a red '1' next to it. The description for 'Master-Detail Relationship' states: 'Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:'. It then lists three bullet points: 'The relationship field is required on all detail records.', 'The ownership and sharing of a detail record are determined by the master record.', and 'When a user deletes the master record, all detail records are deleted.' It also mentions that 'You can create rollup summary fields on the master record to summarize the detail records.'

The screenshot shows the 'New Relationship' wizard, Step 2: Choose the related object. The 'Related To' dropdown is set to 'Sales order' and is highlighted with a red box, with a red '2' next to it. The 'Next' button is highlighted with a red box, with a red '3' next to it. The wizard title is 'Dispatch/Tracking New Relationship'.

The screenshot shows the 'New Relationship' wizard, Step 3: Enter the label and name for the lookup field. The 'Field Label' and 'Field Name' are both set to 'Sales order' and are highlighted with a red box, with a red '4' next to it. The 'Next' button is highlighted with a red box, with a red '5' next to it. The wizard title is 'Dispatch/Tracking New Relationship'.

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# Create A Master-Detail Relationship On Dispatch/Delivery Object

Follow steps 1 to 5 of field creation then follow below steps.

1. Select Master-Detail Relationship as the Data Type and click Next.
2. For Related to, enter Sales order.
3. Click Next.
4. For Field Label, enter Sales order.
5. Click Next, Next, Next and Save.

The screenshot shows the 'New Relationship' dialog box with the 'Master-Detail Relationship' option selected. The dialog box has a title bar 'DispatchTracking' and a subtitle 'New Relationship'. It contains three radio button options: 'Formula', 'Roll-Up Summary', and 'Master-Detail Relationship'. The 'Master-Detail Relationship' option is selected and highlighted with a red box and a red number '1'. Below the options, there is a description of the 'Master-Detail Relationship' and a list of bullet points. The description states: 'Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:'. The bullet points are: 'The relationship field is required on all detail records.', 'The ownership and sharing of a detail record are determined by the master record.', 'When a user deletes the master record, all detail records are deleted.', and 'You can create rollup summary fields on the master record to summarize the detail records.' Below the bullet points, there is a paragraph: 'The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.'

The screenshot shows the 'New Relationship' dialog box at 'Step 2 of 6: Choose the related object'. The 'Related To' field is set to 'Sales order' and is highlighted with a red box and a red number '2'. The 'Next' button is highlighted with a red box and a red number '3'. The dialog box has a title bar 'DispatchTracking' and a subtitle 'New Relationship'. It contains a progress bar at the top with 'Step 2 of 6' and a 'Help for this Page' link. Below the progress bar, there are 'Previous', 'Next', and 'Cancel' buttons. The 'Next' button is highlighted with a red box and a red number '3'. Below the buttons, there is a text label 'Select the other object to which this object is related.' and a dropdown menu with 'Sales order' selected. The dropdown menu is highlighted with a red box and a red number '2'. Below the dropdown menu, there are 'Previous', 'Next', and 'Cancel' buttons.



Dispatch/Tracking  
New Relationship

Help for this Page

Step 1 of 6: Enter the label and name for the lookup field

Field Label: Sales\_order

Field Name: Sales\_order

Description:

Help Text:

Previous Next Cancel

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## Create A Lookup Relationship On Sales Order Object With Account Object

1. Follow steps 1 to 5 of field creation then follow below steps.
2. Select look up Relationship as the Data Type and click Next.
3. For Related to, enter Account.
4. Click Next.
5. For Field Label, enter Customer.
6. Click Next, Next, Next and Save.

<input type="radio"/> Formula	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.
<input type="radio"/> Roll-Up Summary 	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.
<input checked="" type="radio"/> <b>Lookup Relationship</b> <span style="color: red; font-weight: bold;">1</span>	<p>Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.</p> <p>Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:</p> <ul style="list-style-type: none"> <li>• The relationship field is required on all detail records.</li> <li>• The ownership and sharing of a detail record are determined by the master record.</li> <li>• When a user deletes the master record, all detail records are deleted.</li> <li>• You can create rollup summary fields on the master record to summarize the detail records.</li> </ul> <p>The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.</p>
<input type="radio"/> Master-Detail Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Sales order Help for this Page

## New Relationship

**Step 2. Choose the related object** **Step 2**

Select the other object to which this object is related

Related To: Account Next

2

**Field Label** Customer Next

**Field Name** Customer 5

**Description**

**Help Text**

4

**Note** - Similarly create one more lookup field- Field Name - Contact  
Related to - Contact

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## Create A Lookup Relationship On Sales Order Object With Contact Object With Use Of Lookup Filter.

**Lookup Filter**- Lookup filters limit the records available in the lookup. A lookup filter can reference other fields on the same record (source); fields on the records of the lookup object (target); fields on the user's record, profile, and role; and fields on records directly related to the target object.

Follow steps 1 to 5 of field creation from activity 1 then follow below steps.

1. Select look up Relationship as the Data Type and click Next.
2. For Related to, enter **Contact**.
3. Click Next.
4. For Field Label, enter **Contact**.
5. Click **lookup filter**.
6. Provide filter as given below & also refer picture (Screenshot of Step 6)  
**Contact: Account ID equals Sales Order: Customer**
7. Click Next, Next, Next and Save.

<input type="radio"/> Formula	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.
<input type="radio"/> Roll-Up Summary 	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.
<input checked="" type="radio"/> <b>Lookup Relationship</b> <span style="color: red; font-weight: bold;">1</span>	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none"> <li>The relationship field is required on all detail records.</li> <li>The ownership and sharing of a detail record are determined by the master record.</li> <li>When a user deletes the master record, all detail records are deleted.</li> <li>You can create rollup summary fields on the master record to summarize the detail records.</li> </ul> The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
<input type="radio"/> External Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.


Sales order Help for this Page 

## New Relationship

Step 2. Choose the related object
Step 2


[Previous](#) [Next](#) [Cancel](#)


Select the other object to which this object is related.

Related To Contact 


[Previous](#) Next [Cancel](#)


3

Field Label Contact 
4

Field Name Contact 

Description


Help Text 

Child Relationship Name Sales\_orders1 

Required ☐ Always require a value in this field in order to save a record

What to do if the lookup record is deleted? ☒ Clear the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity 

**Lookup Filter**

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

► Show Filter Settings
5

**Lookup Filter**

Optionally, create a filter to limit the records available to users in the lookup field. [Get new filter](#)

**Filter Criteria**

Instant Suggested Criteria

Field	Operator	Value / Field	Order From Scratch
Contact Account ID	equals	Field	
AND: Contact typing to search for a field	None	Value	
AND: Contact typing to search for a field	None	Value	

**Filter Type**

☒ **Required.** The user-entered value must match filter criteria. If it doesn't, display this error message to user:   
☐ **Optional.** The user can remove the filter or enter values that don't match criteria.

**Lookup Window Text**

Add this informational message to the lookup window:

**Action** ☒ **Enable this filter**

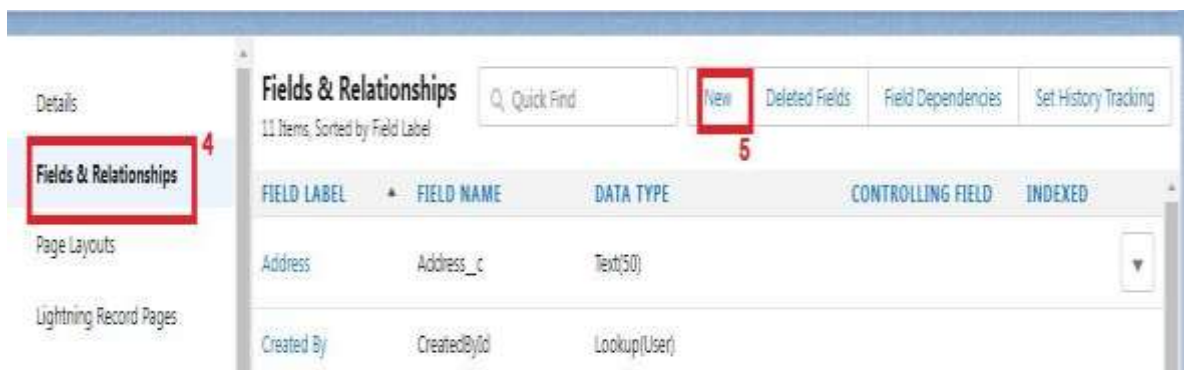
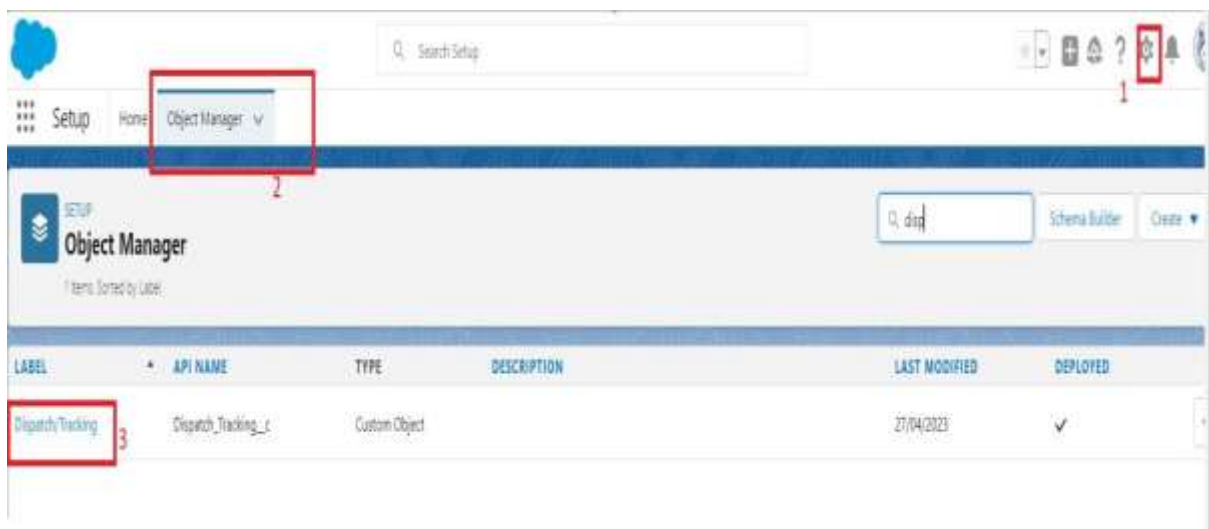
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## Create Order Date Field On Sales Order

1. Click the gear icon and select Setup. This launches Setup in a new tab.
2. Click the Object Manager tab next to Home.
3. Select Sales Order
4. Select Fields & Relationships from the left navigation
5. Click New
6. Select the Date as the Data Type, click Next.
7. For Field Label, enter Order date.
8. Click Next, Next, then Save & New.



<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the Excel or another spreadsheet.
<input checked="" type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When user entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If it address when clicking Send an Email. Note that custom email addresses cannot be used

Field Label	<input type="text" value="Order date"/>	<a href="#">i</a>
Field Name	<input type="text" value="Order_date"/>	<a href="#">i</a>
Description	<input type="text"/>	
Help Text	<input type="text"/>	

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## Cross-Object Formula Field

A cross-object formula field is basically a formula field.

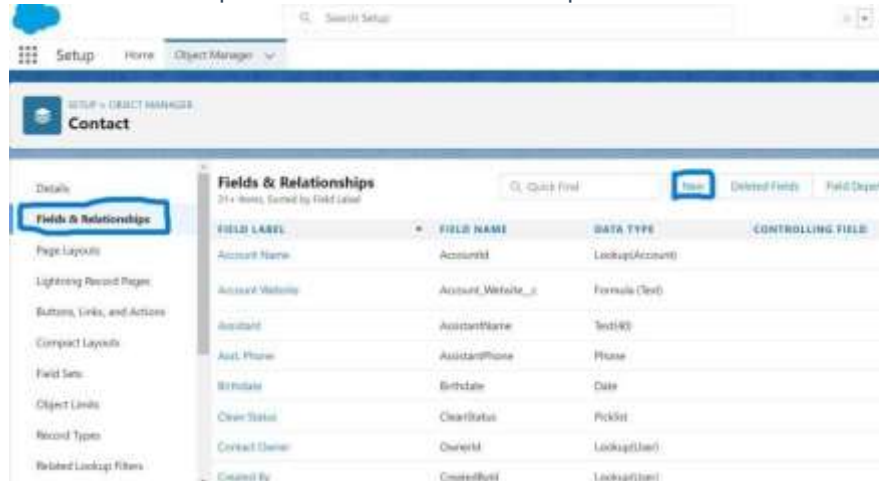
A cross-object formula can reference merge fields from a master (“parent”) object if an object is on the detail side of a master-detail relationship.

A cross-object formula works with Lookup relationships as well as in Master detail relationship. You can reference fields from objects that are up to 10 relationships away.

Creation of cross object formula field-

1. Select your object from object selection has Contact.

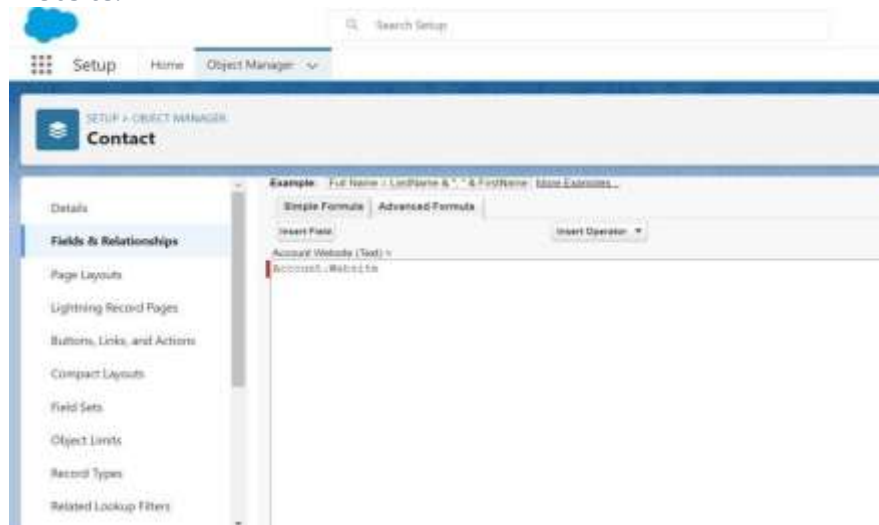
2. And select the option fields and relationships.

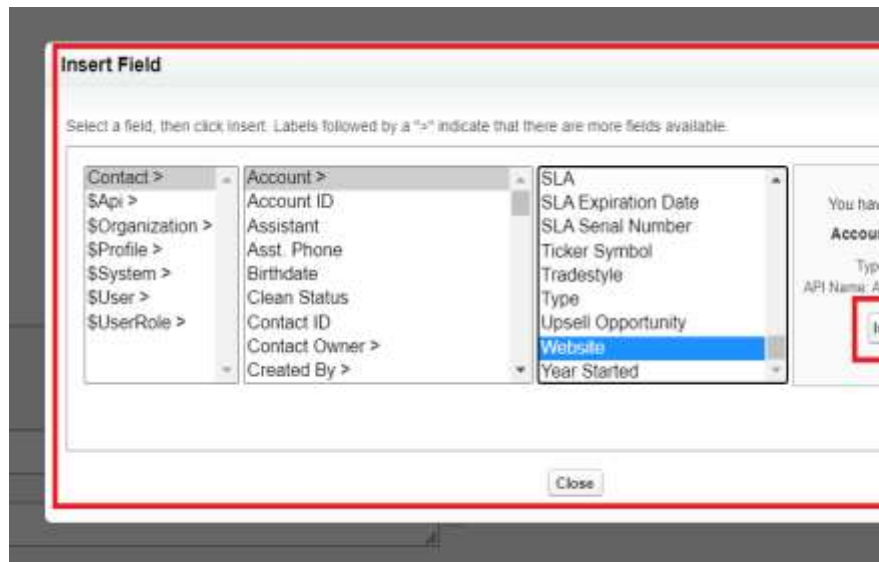


3. At the top right side you can find a new select that option.
4. Now you have to select data type as **formula**.



5. And you will navigate to enter the details page where you give the field label.
6. And give the label name has Account Website
7. Select formula return type **Text**
8. In the formula field enter this formula Account Website.





9. Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.
10. Select the next option, select the page layout and save it.

**Note** – Give a help text while creating Location field on Warehouse Object.

Help Text- **To locate product in Warehouse.**

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## User

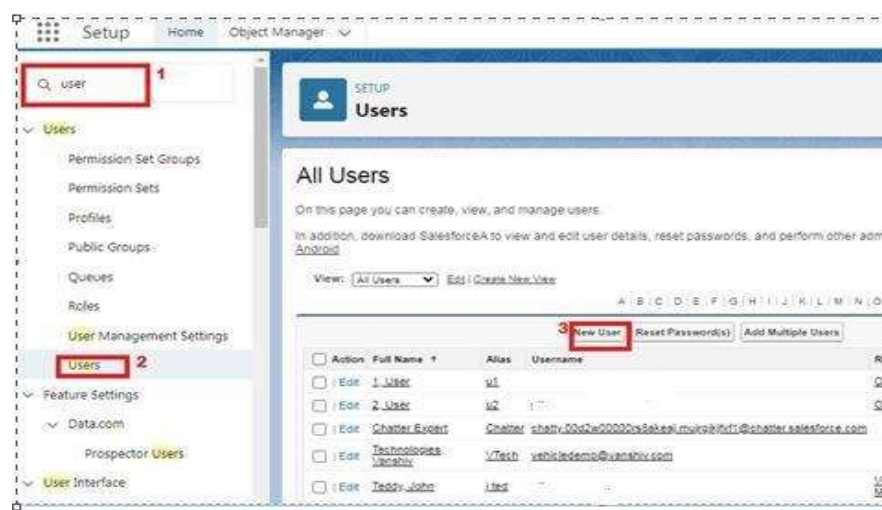
A user is **anyone who logs in to Salesforce**. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

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## Creating A User

1. From Setup, in the Quick Find box, enter Users.
2. Select Users.
3. Click New User.



4. Enter the First Name and Last Name manager and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
5. Select a User License as Salesforce
6. Select Standard User profile.

## New User

The screenshot shows the 'New User' form in Salesforce. The 'General Information' tab is selected. A red box highlights the input fields for 'First Name', 'Last Name', 'Email', 'Username', and 'Nickname'. To the right of these fields, the 'User License' is set to 'Salesforce' and the 'Profile' is set to 'Standard User'. The 'Active' checkbox is checked. Other options like 'Marketing User', 'Offline User', 'Knowledge User', and 'Flow User' are unchecked.

7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

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## Validation Rules

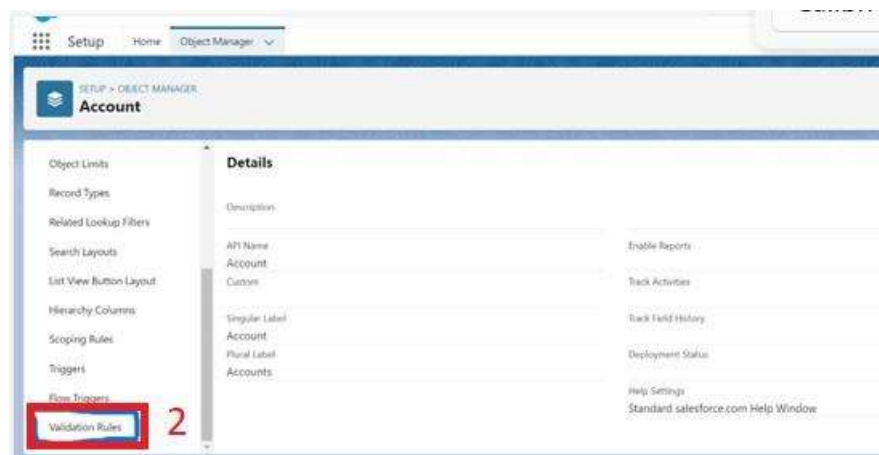
Validation rules verify that the data a user enters in a record meets the standards you specify before the user can save the record. As a crm product owner they requested to create a validation rule on account object on the phone field.

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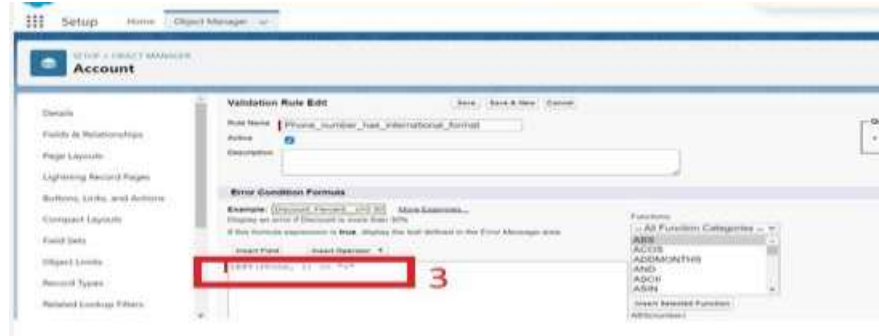
## Creation Of Validation Rule

1. Navigate to object manager and select Account object.
2. In details section scroll down and find validation rule in it.





3. Click new, give the label name and in edit error conditional formula give the formula  
- LEFT(Phone, 1) <> "+" .
4. And in error message give the description has  
Phone number must begin with + (country code).
5. In error location select field.



6. Save

- x

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## User Adoption

Toggle navigation

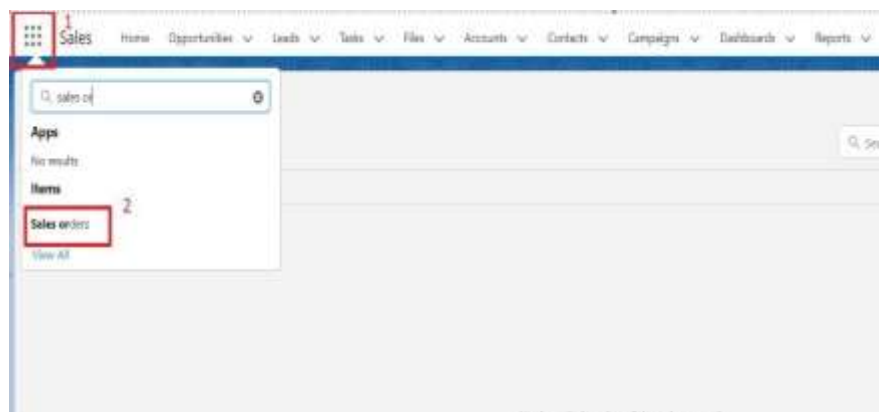
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## Create Record (Sales Order)

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Sales Order tab.
4. Click new button



5. Fill all Sales Order record details.
6. Click on Save Button

The screenshot shows the 'New Sales order' form in Salesforce. The form is titled 'New Sales order' and has a tab labeled 'Information'. It contains fields for 'Sales order Number', 'Owner' (Vanshiv Technologies), 'Status' (Open), 'Customer' (United Oil & Gas Corp.), 'Contact' (Oil Supply), and 'Order Date' (02/05/2023). A red box highlights the 'Status', 'Customer', 'Contact', and 'Order Date' fields, with a red '5' next to it. Another red box highlights the 'Save' button at the bottom right, with a red '6' next to it.

**Note**-Similarly create few records of each object.

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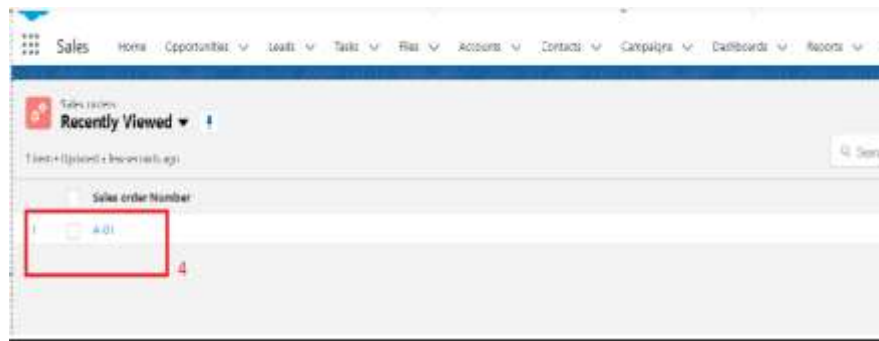
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## View Record (Sales Order)

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.



3. Click on Sales Order Tab.
4. Click on any record name. you can see the details of the Sales Order



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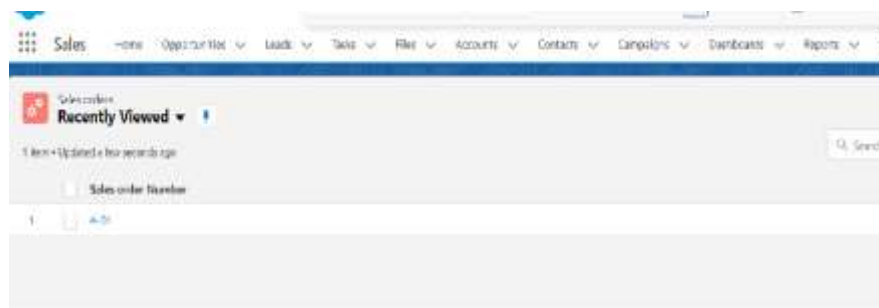
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## Delete Record (Sales Order)

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.



3. Click on Sales Order Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



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## Reports

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. Tabular Reports:  
This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.
2. Summary Reports:  
It is the most commonly used type of report. It



allows grouping of rows of data, view subtotal, and create charts.

3. Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data in joined reports are organized in blocks. Each block acts as a subreport with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

### Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

A report type cannot include more than 4 objects.

Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where "Allow Reports" is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with "Manage Custom Report Types"

permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:  
With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.
  2. Editor:  
With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.
  3. Manager:  
With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report. From this milestone we are going to import the data and create the reports and dashboards for datavisualization in the application
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    - Fields And Relationship

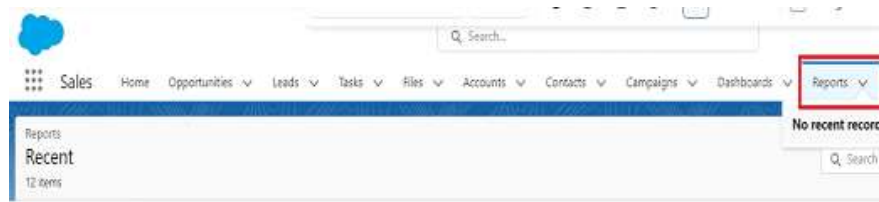
- Creation Of Fields For The Dispatch/Tracking Object
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  - Delete Record (Sales Order)
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## Create Report

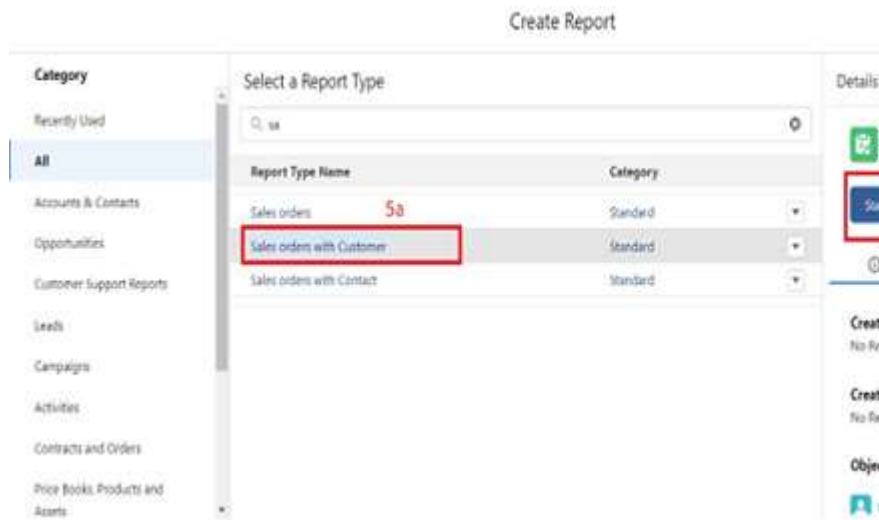
1. Click App Launcher and
2. Select Sales App



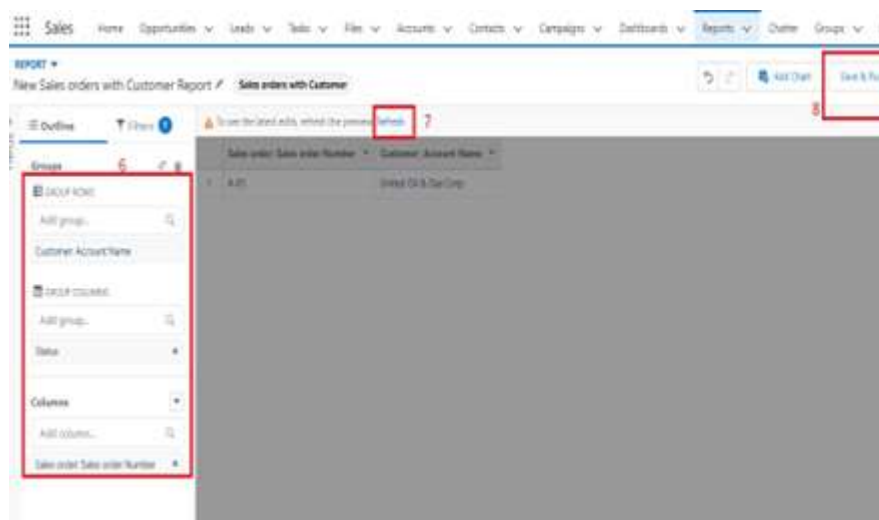
3. Click reports tab
4. Click New Report.



5. Click the report type as Sales order with customer Click Start report.



6. Customize your report, in group rows select - Customer Account Name
7. Click refresh
8. Click save and run



9. Give report name – New Sales orders with Customer Report

10. Click Save

Save Report

**9**

\* Report Name

New Sales orders with Customer Report

Report Unique Name ⓘ

New\_Sales\_orders\_with\_Customer\_Report\_wZX

Report Description

Folder

Private Reports

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## View Report

1. Click on App Launcher on left side of screen.
2. Search “Sales App” & click on it.



3. Click on Reports Tab.
4. Click on New Sales orders with Customer Report and see records.

Home	Opportunities	Leads	Tasks	Files	Accounts	Contacts	Campaigns
------	---------------	-------	-------	-------	----------	----------	-----------

Report Name	Description	Folder	Created By
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Pr
New Sales orders with Customer Report		Private Reports	rakesh team le
Opportunity Details		Private Reports	rakesh team le

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## Dashboards

Dashboards **let you curate data from reports using charts, tables, and metrics.** If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

### Toggle navigation

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## Create Dashboard

1. Click on Dashboards tab from the “Sales App” application,
2. Click on new dashboard



3. Give name- Sales App Dashboard
4. Click create

## New Dashboard

\* Name

Sales App Dashborad

3

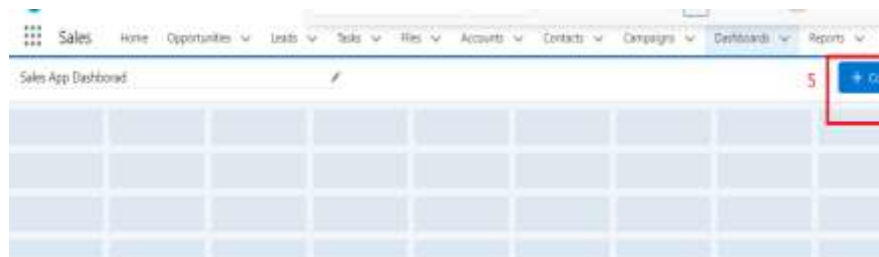
Description

|

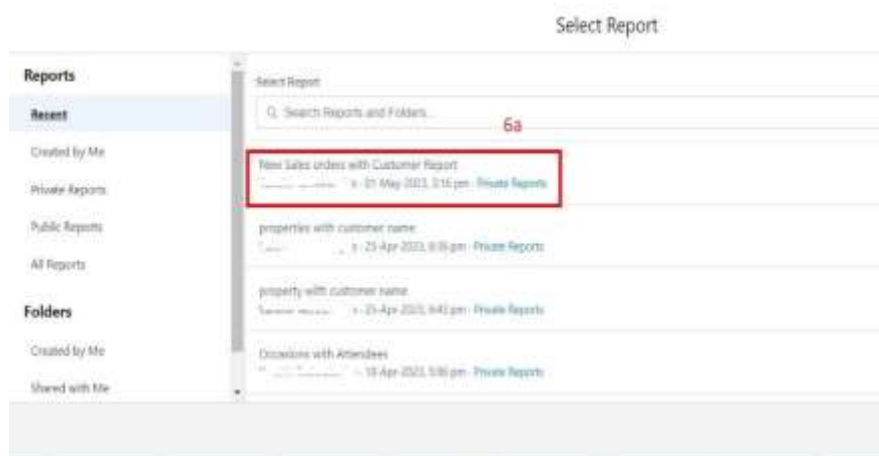
Folder

Private Dashboards

5. Give your dashboard a name and click on +component.



6. Select the New Sales orders with Customer Report which you created.



7. For the data visualization select any of the chart, table etc as your wish.
8. Click add

**Add Component**

Report  
New Sales orders with Customer Re

☐ Use chart settings from report

**Display As**

X-Axis: 7  
Customer: Account Name  
Status

**Preview**

New Sales orders with Customer Report

Record Count

Status	Record Count
Shipped	1
Open	2
Returned	1

Customer: Account Name = Status

View Report (New Sales orders with Customer Report)

9. Click save

**Save Report**

\*Report Name 9  
New Sales orders with Customer Report

Report Unique Name ⓘ  
New\_Sales\_orders\_with\_Customer\_Report\_wZX

Report Description

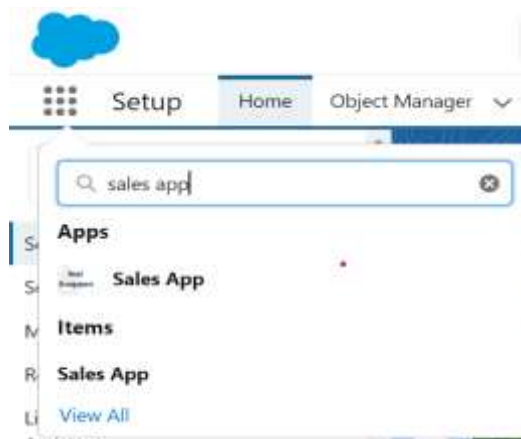
Folder  
Private Reports

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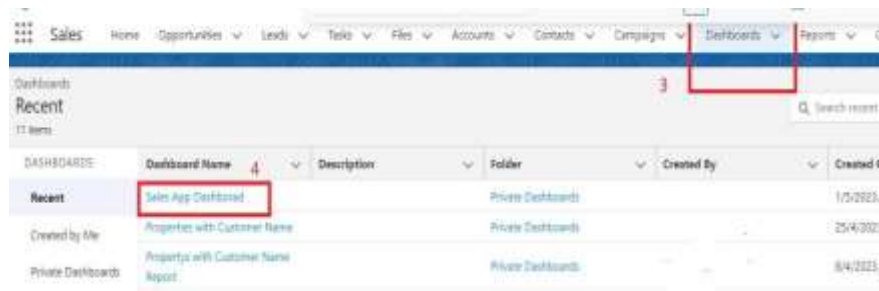
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## View Dashboard

1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.



3. Click on Dashboard Tab.
4. Click on Sales App Dashboard and see graph view of records



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## Flows

Flows are an automation tool provided by Salesforce which can be used to perform various tasks like, Sending an Email, Posting a chatter, Sending custom Notifications &, etc. Flow is the most powerful automation tool provided by Salesforce. It can be trigger for record insert, update and record delete and it can be run for both after and before events.

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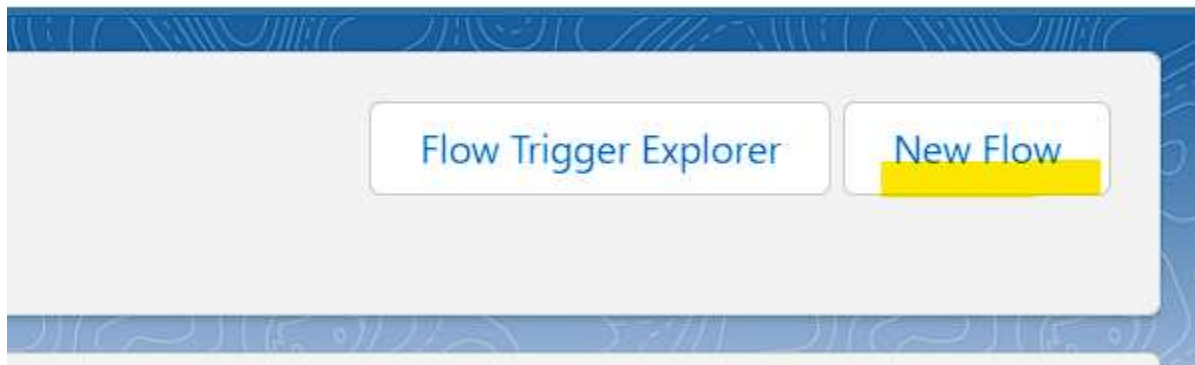
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## Create Flow

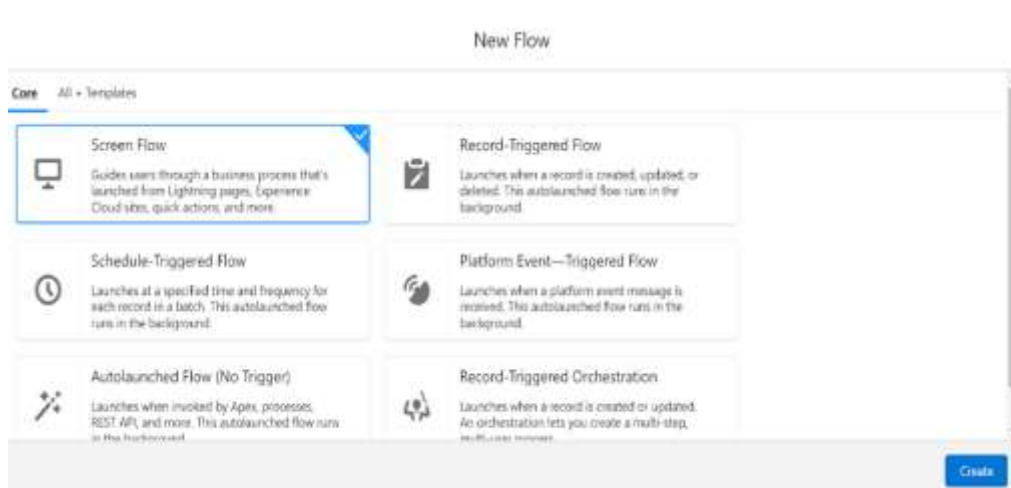
- Click on setup gear



- In quick find search for Flows
- Choose new flow option at right side of the page




- Now select screen flow as a new flow






1. Left side corner of the page you can find a toggle click on that and select a new resource.





Select Elements



Toolbox ×

Manager

New Resource

2. and select resource type has variable
3. Give api name as Recordid
4. and select data type as Text
5. At bottom for Availability outside the flow check the box as Available for Input
6. Click on done

New Resource

\* Resource Type

Variable

\* API Name

Recordid

Description

\* Data Type

Text

☐ Allow multiple values (collection) ⓘ

Default Value

Enter value or search resources...

Cancel

Done

\* Data Type

Text

☐ Allow multiple values (collection) ⓘ

Default Value

Enter value or search resources...

Availability Outside the Flow

☒ Available for input

☐ Available for output

Cancel

Done

7. Now below the start button click on add element and choose Get Records



- Now give the label name as Get Account Record
- For Get record of object choose object as - Account
- For Filter account records condition requirements are - All conditions are met
- Field- Account id Operator- equals Value- Recordid (variable which we had created )
- For how many records to share - Only the first record
- How to store record data- Automatically stores all fields.
- Click on done.

A screenshot of the 'New Get Records' configuration window in Salesforce Flow Builder. The window has a title bar 'New Get Records'. Below the title bar, there is a subtitle 'Find Salesforce records and store their field values in flow variables.' The form contains several fields: 'Label' with the value 'Get Account Record', 'API Name' with the value 'Get\_Account\_Record', a 'Description' field, 'Get Records of This Object' section with 'Object' set to 'Account', and a 'Filter Account Records' section. At the bottom right, there are 'Cancel' and 'Done' buttons.

## Edit Get Records

**Filter Account Records**

Condition Requirements  
All Conditions Are Met (AND) ▼

Field	Operator	Value
Id	Equals ▼	Recordid x

+ Add Condition

**Sort Account Records**

Sort Order  
Not Sorted ▼ ⚠ If you store only the first record, filter by a unique field, such as ID.

Cancel Done

+ Add Condition

**Sort Account Records**

Sort Order  
Not Sorted ▼ ⚠ If you store only the first record, filter by a unique field, such as ID.

**How Many Records to Store**

☒ Only the first record  
☐ All records

**How to Store Record Data**

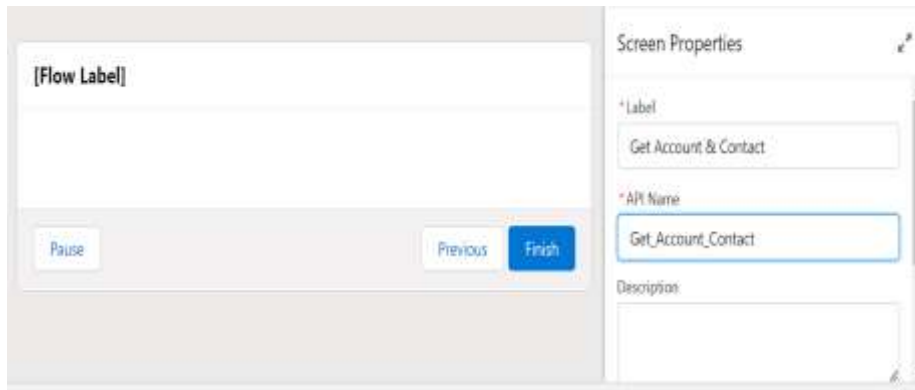
☒ Automatically store all fields  
☐ Choose fields and let Salesforce do the rest  
☐ Choose fields and assign variables (advanced)

Cancel Done

- Now again add the element below the Get account record and select Screen as your element



- Give the label name as Get Account & Contact



- Left side in the component section search for Name and drag it to the screen
- Give the api name as Name



- Now drag Email from component section and move it to the screen
- Give the Api name- Email
- Required - {!\$GlobalConstant.True}



First Name

Last Name

Last Name

Email

\*Email

you@example.com

Pause Previous Finish

← Email

Read Only

{!\$GlobalConstant.False}

Required

{!\$GlobalConstant.True}

Value

Enter value or search resources...

> Set Component Visibility

1. Now drag the Phone from component to screen below the email
2. Give the Api name as - Phone
3. Required- `{!$GlobalConstant.True}`

New Screen

Last Name

\*Email

you@example.com

Phone

\*Phone

Pause Previous Finish

← Phone

\* API Name

Phone

\* Label

Phone

Pattern

Enter value or search resources...

Placeholder text

Cancel Done

New Screen

Last Name

\*Email

you@example.com

Phone

\*Phone

Pause Previous Finish

← Phone

Read Only

Enter value or search resources...

Required

{!\$GlobalConstant.True}

Value

Enter value or search resources...

> Set Component Visibility

Cancel Done

1. Now Drag Address from component section to screen
2. Give the Api name as - Address

City Value-  `{!Get_Account_Record.ShippingCity}`

Country Value-  `{!Get_Account_Record.BillingCountry}`

Postal code-  `{!Get_Account_Record.ShippingPostalCode}`

State/province value-  `{!Get_Account_Record.ShippingState}`

Street Value-  `{!Get_Account_Record.ShippingStreet}`

This screenshot shows the configuration for an 'Address' component. On the left, the component is displayed on a screen with a title bar 'Address' and a location pin icon. The form contains a 'Street' field, a 'City' field, a 'State/Province' field, a 'Zip/Postal Code' field, and a 'Country' field. On the right, the configuration panel for the 'Address' component is open. It shows the 'API Name' set to 'Address'. The 'City Value' is set to  `{!Get_Account_Record.ShippingCity}`. The 'Country Options' field has a search bar with the text 'Enter value or search resources...'. The 'Country Value' field is currently empty. At the bottom right of the configuration panel are 'Cancel' and 'Done' buttons.

This screenshot shows the configuration for an 'Address' component, similar to the one above but with different bindings. The component on the left is the same. The configuration panel on the right shows the 'Country Value' set to  `{!Get_Account_Record.BillingCountry}`. The 'Label' is set to 'Address'. The 'Postal Code Value' is set to  `{!Get_Account_Record.ShippingPostalCode}`. The 'State/Province Options' field is currently empty. The 'Cancel' and 'Done' buttons are at the bottom right.

The image shows a Salesforce Lightning page with a tab labeled 'Address'. The form contains the following fields:

- Street (single-line text input)
- City (single-line text input)
- State/Province (single-line text input)
- Zip/Postal Code (single-line text input)
- Country (single-line text input)

To the right of the form is a property inspector for the 'Address' component. It shows the following properties:

- State/Province Options: Enter value or search resources... (with a search icon)
- State/Province Value: {!Get\_Account\_Record.ShippingState}
- Street Value: {!Get\_Account\_Record.ShippingStreet}

- Click on done and save it. Give the label name as Get Account & Contact.

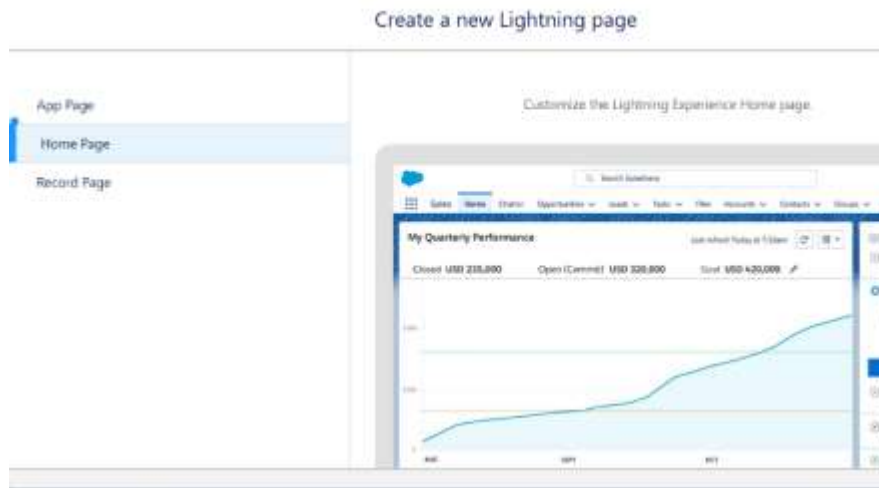
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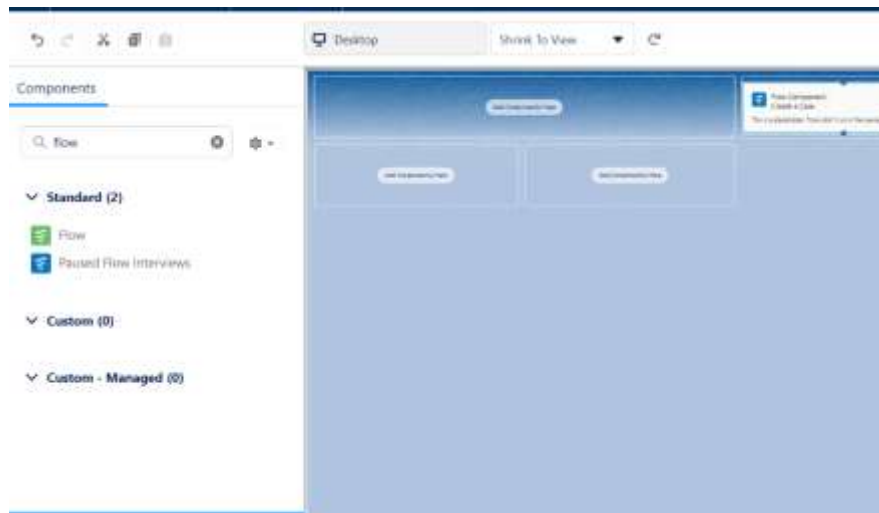
## To Create Lightning Home Page

1. Click on setup gear.
2. Now search for lightning App builder.
3. And select New option
4. In create a new lightning page select Home page.





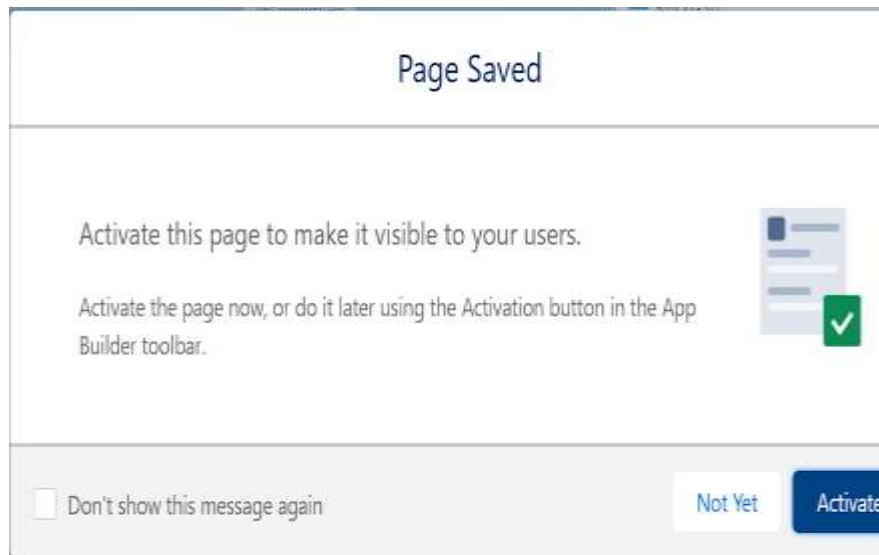
5. Select Next
6. Give the label name - Account & Contact
7. Choose a standard home page.
8. Now in the component section select flow and drag down it to Corner of the page.



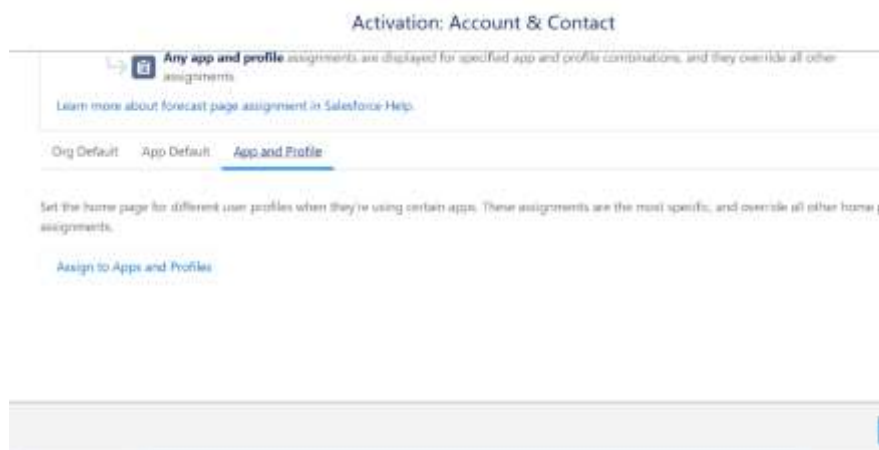
9. At the right side select the flow Get Account & Contact



10. at the right side top of the page click on Save.
11. You will get the populate notification and click on activate.



12. you will get an activation pop up select App and profile.



13. Select Sales app in lightning app selection.
14. In profiles select System administrator, Standard user, Standard platform user.
15. Save it.

Lightning Apps (17)	
App Name	Description
<input type="checkbox"/> Queue Management	Create and manage queues for your business.
<input type="checkbox"/> Sales	Manage your sales process with accounts, leads, opportunities
<input checked="" type="checkbox"/> Sales App	
<input type="checkbox"/> Sales Console	(Lightning Experience) Lets sales reps work with multiple reco
<input type="checkbox"/> Salesforce CMS	Manage content and media for all of your sites.
<input type="checkbox"/> Salesforce Scheduler Setup	Set up personalized appointment scheduling.
<input type="checkbox"/> ...	...

Profiles (48)	
Profile	Description
<input type="checkbox"/> Smartbridge Help center Profile	
<input type="checkbox"/> Solution Manager	
<input checked="" type="checkbox"/> Standard Platform User	
<input checked="" type="checkbox"/> Standard User	
<input checked="" type="checkbox"/> System Administrator	
<input type="checkbox"/> Work.com Only User	

16. Now click on app launcher and search for Sales App
17. At the right side corner you can find a Pencil icon to personalize navigation click on that.
18. Click on add more items and in available items click on all and search for home.
19. Move the home page to top and click on save

## Edit Sales App App Navigation Items

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.

[Learn More](#) ⓘ

NAVIGATION ITEMS (23)

- Accounts
- Campaigns
- Contacts
- Leads
- Opportunities
- Products

[Reset Navigation to Default](#) ⓘ

## Add Items

### Available Items

Favorites

All

Q home

0 items selected

+ Digital Experiences Home

+ Home

Personalize your nav bar for this app. Reorder items, and rename or remove items you've added.

[Learn More](#) ⓘ

1 item added to your list. Save your updates.

NAVIGATION ITEMS (24)

- Home
- Accounts
- Campaigns
- Contacts

[Reset Navigation to Default](#) ⓘ

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## To Send An Email Alert To The Customer Once Order Is Confirmed

To send an email alert to the customer once order is confirmed.

1. Navigate to setup click on object manager
2. Select sales order as object
3. click on fields and relationships
4. Select Email id field and click on edit
5. Than in general options select Required Field
6. Save it.

Now Create a new field Order confirmed

1. On the same object sales order create a Picklist field.
2. Give the label name as Order confirmed.
3. And in Values give 1) Yes  
2) No
4. Make it as Required field.

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## To Create Record Trigger Flow

To create record triggered flow

1. Click on setup and search for flows.

2. Then click on new flow
3. Select Record Trigger flow as your flow
4. In Object search for Sales order
5. In Configure Trigger select A record is created
6. In set entry conditions All conditions are Met
7. In fields search for Order confirmed
8. Operator - Equals
9. In values select - Yes
10. In optimize the flow for Select Action and related Records

Configure Start

---

### Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\* Object

Sales Order

---

### Configure Trigger

**\* Trigger the Flow When:**

☒ A record is created  
☐ A record is updated  
☐ A record is created or updated  
☐ A record is deleted

---

### Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
Order_Confirmed__c	Equals	Yes

[+ Add Condition](#)

---

**\* Optimize the Flow for:**

#### Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

#### Actions and Related Records

Update any record from the flow. This more flexible flow runs *after* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction completes.

11. Now click on add element and in Logic section select Decision element



12. Give the element name as Is Order confirmed
13. In Outcome Details Label as Order Status
14. In condition requirement All Conditions are Met
15. In resource select \$Record than field as Order confirmed
16. Operator - Equals
17. Value as Yes
18. Click on done

**Edit Decision**

\* Label:

\* API Name:

Description:

**Outcomes** For each path the flow can take, create an outcome. For each outcome, specify the conditions that must be met for the flow to take that path.

OUTCOME ORDER +

- order status
- Default Outcome

OUTCOME DETAILS

\* Label:

\* Outcome API Name:

Condition Requirements to Execute Outcome:

Resource:

Operator:

Value:

+ Add Condition

19. Now Below the Order status Click on add element and select Action as your element.



20. Now in action select Send email

**Toggle navigation**

xx

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## Triggers

A Trigger is a segment of Apex code which executes before or after inserting or modifying a Salesforce record based on the condition provided. There are different types of triggers based on the action going to be performed.

They are Before Triggers and After Triggers. Triggers allow modification of another record of the same type or different type.

There are two different types of Apex triggers within Salesforce:

**“Before” Apex Triggers.** These are used to update or validate the value in a record before you save it to your Salesforce database.

**“After” Apex Triggers.** These are used to access the values contained within a record and use that value to make changes to other records in your Salesforce database. Unlike “Before” triggers, “After” triggers are read-only.

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## Trigger On Account To Prevent Duplicate Name

**Trigger on Account to prevent Duplicate Name.**

Handler

1. Click on Setup and select developer console
2. Click on file and than New
3. Select Apex Class give the name as Toavoidduplicateshandler

```
public class ToAvoidDuplicateHandler {

    public static void preventDuplicate(list<Account> acclist){
        for (Account a : acclist){
            for (Account a1 : [Select id,name from Account]){
                if(a.name == a1.name){
                    a.name.addError('This is a duplicate name');
                }
            }
        }
    }
}
```

```

3  public static void preventDuplicate(list<Account> acclist){
4      for (Account a : acclist){
5          for (Account a1 : [Select id,name from Account]){
6              if(a.name == a1.name){
7                  a.name.addError('This is a duplicate name');
8              }
9          }
10     }
11 }
12
13 }
14
15
16 }

```

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## Trigger

1. Click on Setup and select developer console
2. Click on file and than New
3. Select Apex trigger give the name as Toavoidduplicates
4. Subject as Account.

```
trigger toavoidduplicates on Account (before insert) {
```

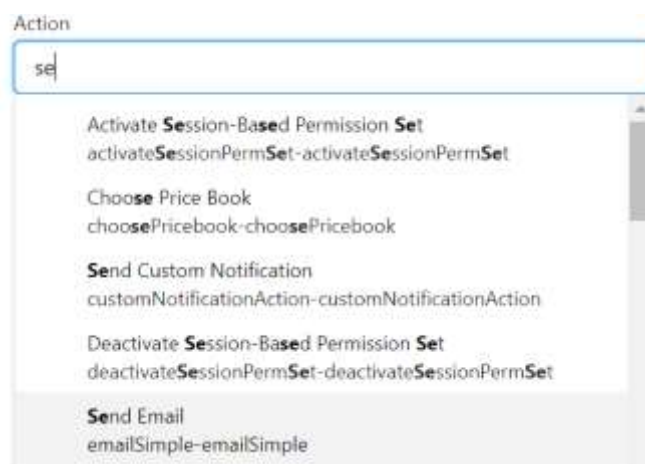
```
    if(trigger.isBefore){
        ToAvoidDuplicateHandler.preventDuplicate(trigger.new);
    }
```

```
}
```

```

toavoidduplicates.apxt  ToAvoidDuplicateHandler.apxc
Code Coverage: None  API Version: 58
1 trigger toavoidduplicates on Account (before insert) {
2
3     if(trigger.isBefore){
4         ToAvoidDuplicateHandler.preventDuplicate(trigger.new);
5     }
6
7
8 }


```



21. Give the label as Send an email to customer
22. Now in body select \$Record and then select Id
23. Move your cursor to front before \$record and give the text as Hi Your order with than comes \$record is confirmed
24. In recipients email address list - select Record and then Email id as your field
25. In subject give it as - Order confirmed.
26. Click on done.
27. Save the flow as Email to customer
28. And activate the flow.

#### Send email to customer (Send\_email\_to\_customer)

Set Input Values for the Selected Action

<p><b>A<sub>3</sub></b> Body </p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;">Hi Your order with (!\$Record.Id) is confirmed</div>	<p> Include</p>
<p><b>A<sub>3</sub></b> Email Template ID</p>	<p> Don't include</p>
<p> Log Email on Send</p>	<p> Don't include</p>

A <sub>3</sub>	Email Template ID	<input type="checkbox"/>	Don't Include
∞	Log Email on Send	<input type="checkbox"/>	Don't Include
A <sub>3</sub>	Recipient Address Collection	<input type="checkbox"/>	Don't Include
A <sub>3</sub>	Recipient Address List ⓘ	<input checked="" type="checkbox"/>	Include
	<input type="text" value="{!\$Record.Email_Id_c}"/>		
A <sub>3</sub>	Related Record ID	<input type="checkbox"/>	Don't Include
∞	Rich-Text-Formatted Body	<input type="checkbox"/>	Don't Include
A <sub>3</sub>	Sender Email Address	<input type="checkbox"/>	Don't Include
A <sub>3</sub>	Sender Type	<input type="checkbox"/>	Don't Include
A <sub>3</sub>	Subject ⓘ	<input checked="" type="checkbox"/>	Include
	<input type="text" value="Order confirmation"/>		

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