

Salesforce

TV Company Mini Project

Introduction:

This mini project was implemented for a TV company to show different fields (page layouts) for the different vendors as per the product type.

Implementation:

Step1:

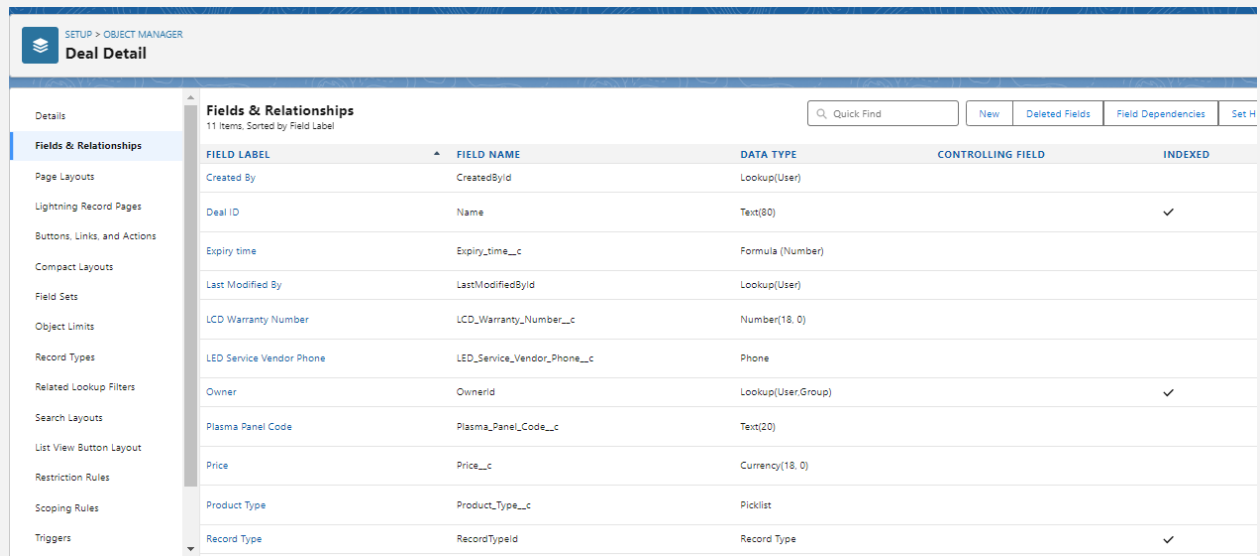
Data Modelling (App and Object creation): Created custom App, object, and fields in Salesforce to store data related to the TV Company's vendors and their products.

App: Home Appliance app

The screenshot displays the Salesforce Lightning App Builder interface. The top navigation bar includes a back arrow, 'Lightning App Builder', 'App Settings', 'Pages', and the current app name 'Home Appliance App Lightning'. On the left, a sidebar under 'App Settings' lists 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and contains the following sections:

- App Details:** Includes fields for 'App Name' (Home Appliance App Lightning), 'Developer Name' (Home_Appliance_App_Lightning), and 'Description' (Tv Company).
- App Branding:** Includes an 'Image' upload area, a 'Primary Color Hex Value' dropdown set to '#0070D2', and 'Org Theme Options' with a checkbox 'Use the app's image and color instead of the org's custom theme'.
- App Launcher Preview:** Shows a preview of the app launcher with a blue square icon containing 'HA' and the text 'Home Appliance App Light... Tv Company'.

Object: Deal Details



The screenshot shows the Salesforce Setup interface for the 'Deal Detail' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main content area is titled 'Fields & Relationships' and displays a table of 11 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Created By, Deal ID, Expiry time, Last Modified By, LCD Warranty Number, LED Service Vendor Phone, Owner, Plasma Panel Code, Price, Product Type, and Record Type. The 'Indexed' column shows checkmarks for Deal ID, Owner, and Record Type.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Deal ID	Name	Text(80)		✓
Expiry time	Expiry_time__c	Formula (Number)		
Last Modified By	LastModifiedById	Lookup(User)		
LCD Warranty Number	LCD_Warranty_Number__c	Number(18, 0)		
LED Service Vendor Phone	LED_Service_Vendor_Phone__c	Phone		
Owner	OwnerId	Lookup(User:Group)		✓
Plasma Panel Code	Plasma_Panel_Code__c	Text(20)		
Price	Price__c	Currency(18, 0)		
Product Type	Product_Type__c	Picklist		
Record Type	RecordTypeId	Record Type		✓

Step 3:

Sharing settings and user management: Configured sharing settings to control access to the data in Salesforce. This involved setting up roles and profiles to ensure that the right people had access to the right data.

Step 4:

Page layouts and Record Types: Created custom page layouts for the different vendors based on their product types. Also created record types to enable different page layouts for the same object based on different criteria.

We need to show different fields to vendor as per the product type (LED, LCD, and Plasma).

When product type selected is LED then show to Tom only LED related fields.

Same with other types of TVs.

The requirement is to show only those fields which are suitable as per the TV type.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Deal Detail

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

Page Layouts
4 Items, Sorted by Page Layout Name

Q Quick Find New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY	
Deal Detail Layout	Mrunali Raut, 2/6/2023, 10:54 PM	Mrunali Raut, 4/17/2023, 11:05 AM	▼
LCD Vendor Page Layout	Mrunali Raut, 2/6/2023, 11:01 PM	Mrunali Raut, 4/17/2023, 11:05 AM	▼
LED Vendor Page Layout	Mrunali Raut, 2/6/2023, 11:00 PM	Mrunali Raut, 4/17/2023, 11:05 AM	▼
Plasma Vendor Page Layout	Mrunali Raut, 2/6/2023, 11:01 PM	Mrunali Raut, 4/17/2023, 11:05 AM	▼

In each page layout we removed the irrelevant fields according to the product type.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Deal Detail

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

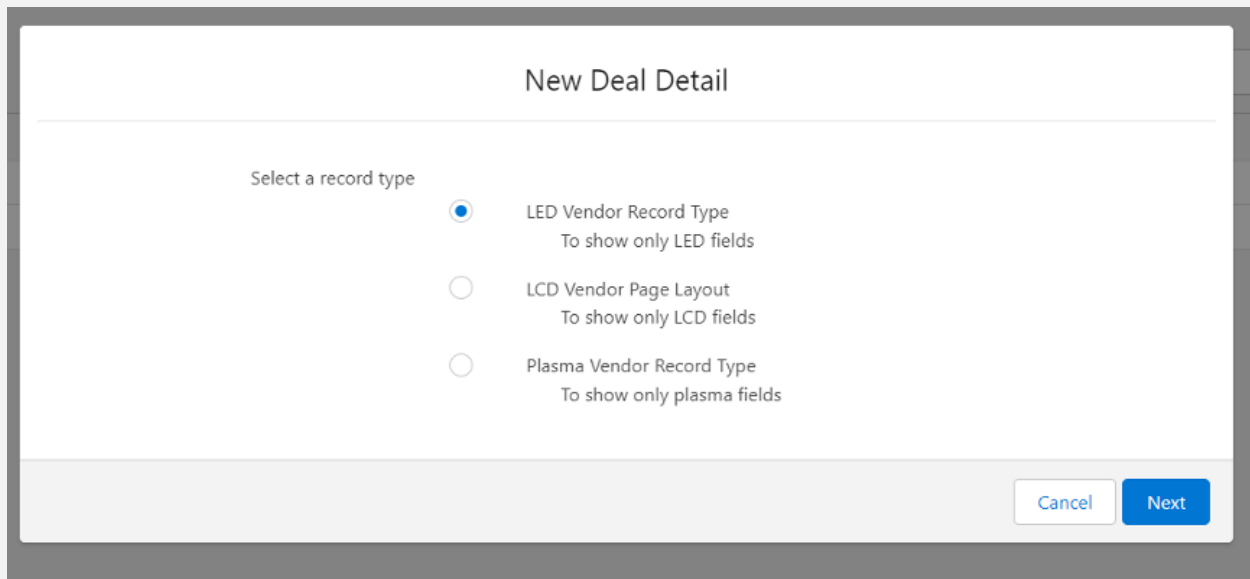
Record Types
3 Items, Sorted by Record Type Label

Q Quick Find New Page Layout Assignment

RECORD TYPE LABEL	DESCRIPTION	ACTIVE	MODIFIED BY	
LCD Vendor Page Layout	To show only LCD fields	✓	Mrunali Raut, 2/8/2023, 11:26 PM	▼
LED Vendor Record Type	To show only LED fields	✓	Mrunali Raut, 2/8/2023, 11:24 PM	▼
Plasma Vendor Record Type	To show only plasma fields	✓	Mrunali Raut, 2/8/2023, 11:26 PM	▼

Created the record types for the respective page layouts.

Outcome:



The image shows a dialog box titled "New Deal Detail". Inside, there is a section labeled "Select a record type" with three radio button options:

- ☒ LED Vendor Record Type
To show only LED fields
- ☐ LCD Vendor Page Layout
To show only LCD fields
- ☐ Plasma Vendor Record Type
To show only plasma fields

At the bottom right of the dialog, there are two buttons: "Cancel" and "Next".

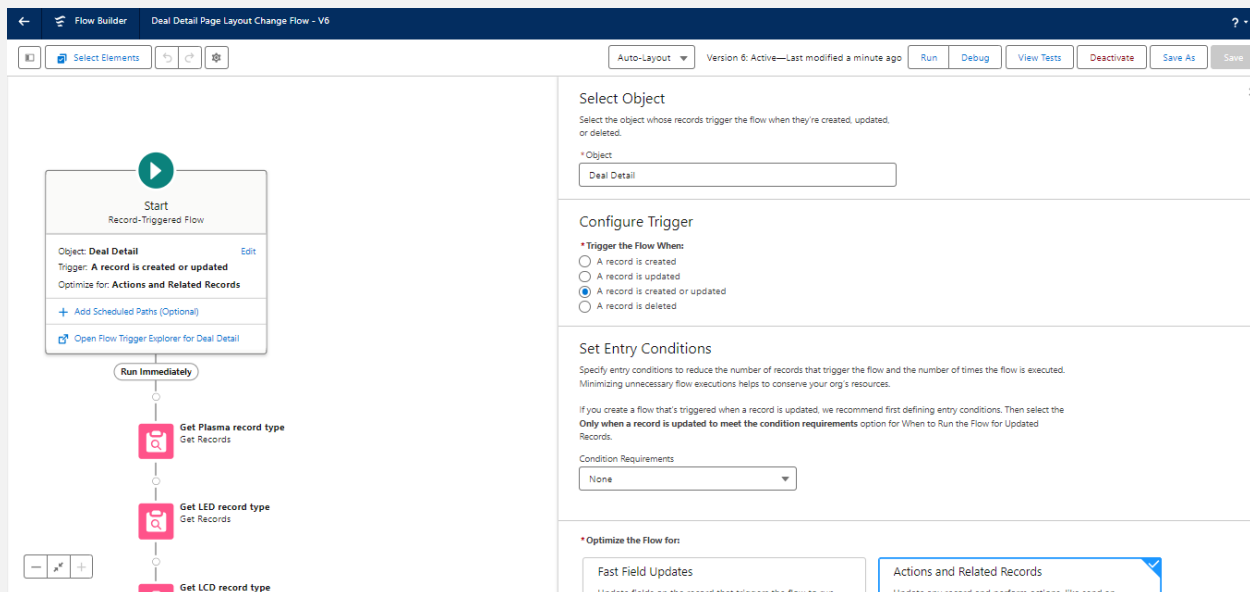
Record type field is added so that we can control fields (page layout) using record type.

Step 5:

Flow: Created and configured a flow to automate the vendor business process.

If the product type is changed or updated then the record type should change automatically so the fields will also be displayed according to the appropriate page layouts.

Configure start:



The image shows the Salesforce Flow Builder interface for a flow named "Deal Detail Page Layout Change Flow - V6". The flow is configured as a "Record-Triggered Flow" for the "Deal Detail" object, triggered by "A record is created or updated".

The flow steps are:

- Start** (Record-Triggered Flow)
- Run Immediately**
- Get Plasma record type** (Get Records)
- Get LED record type** (Get Records)
- Get LCD record type** (Get Records)

The right-hand pane shows the configuration for the selected step, "Get Plasma record type".

- Select Object:** Deal Detail
- Configure Trigger:** Trigger the Flow When: ☒ A record is created or updated
- Set Entry Conditions:** Condition Requirements: None
- Optimize the Flow for:** ☒ Actions and Related Records

Get records element:

Flow Builder: Deal Detail Page Layout Change Flow - V5

Version 5: Inactive—Last modified a few seconds ago

Run Debug View Tests Activate Save As Save

Get Plasma record type
Get Records

Get LED record type
Get Records

Get LCD record type
Get Records

Deal Detail Page Layout Change Decision

LCD Page Layout Change

Plasma Page Layout Change

LCD Record TypeID Change Update Records

Plasma Record Type Change Update Records

Edit Get Records
Get LCD record type (Get_LCD_record_type)

Get Records of This Object

* Object
Record Type

Filter Record Type Records

Condition Requirements
All Conditions Are Met (AND)

Field Operator Value
SubjectType Equals Deal_Detail_c

AND
DeveloperName Equals LCD Vendor Page Layout

+ Add Condition

Sort Record Type Records
Sort Order

Decision box:

Flow Builder: Deal Detail Page Layout Change Flow - V5

Edit Decision

OUTCOME ORDER +

LED Page Layout Change

LCD Page Layout Change

Plasma Page Layout Change

Default Outcome

OUTCOME DETAILS

* Label
LCD Page Layout Change

* Outcome API Name
LCD_Page_Layout_Change

Condition Requirements to Execute Outcome
All Conditions Are Met (AND)

Resource Operator Value
\$Record > Product Type X Equals LCD

+ Add Condition

When to Execute Outcome

☒ If the condition requirements are met

☐ Only if the record that triggered the flow to run is updated to meet the condition requirements

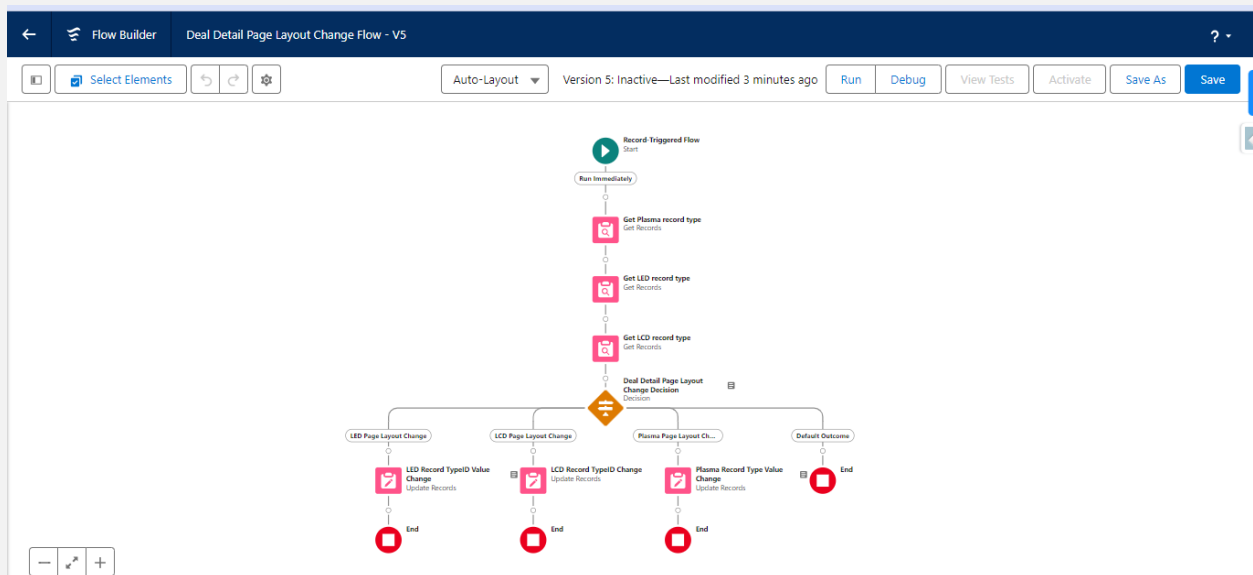
Cancel Done

Update record element:

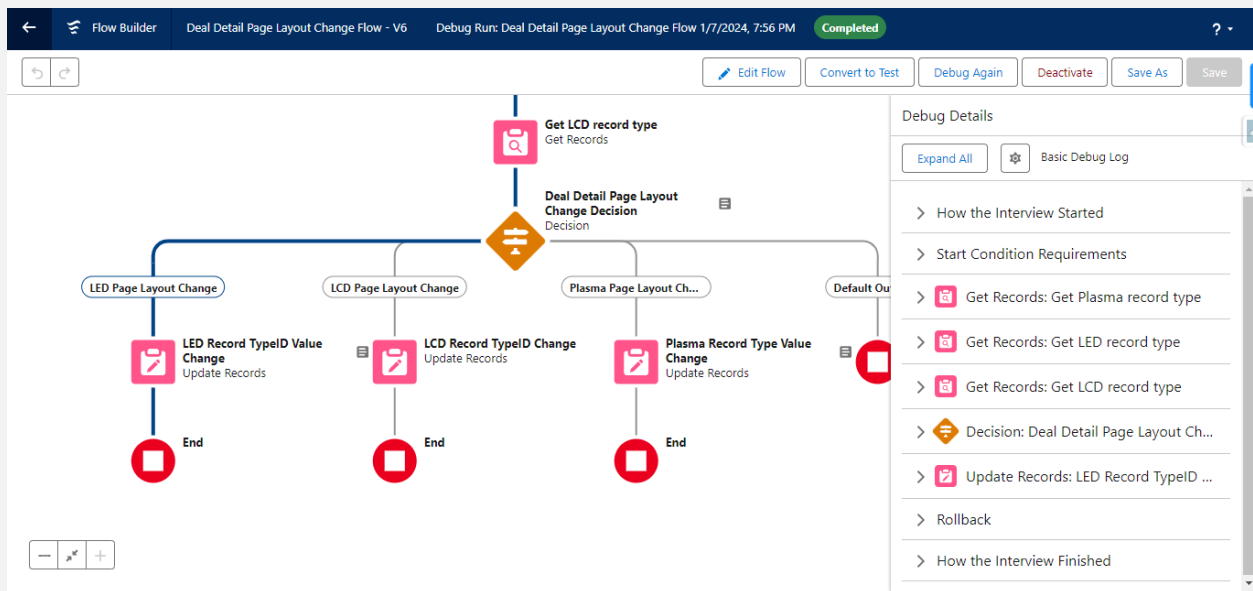
The screenshot shows the Flow Builder interface for a flow named "Deal Detail Page Layout Change Flow - V5". The "Edit Update Records" configuration panel is open for the "LED Record TypeID Value Change" element. The panel includes the following sections:

- How to Find Records to Update and Set Their Values:**
 - ☒ Use the deal detail record that triggered the flow
 - ☐ Update records related to the deal detail record that triggered the flow
 - ☐ Use the IDs and all field values from a record or record collection
 - ☐ Specify conditions to identify records, and set fields individually
- Set Filter Conditions:**
 - Condition Requirements to Update Record:
- Set Field Values for the Deal Detail Record:**
 - Field:
 - Value:
 -

Flow:



Debug:



Testing:

Logged in as Tom user

New Deal Detail

Select a record type

- ☒ LED Vendor Record Type
To show only LED fields
- ☐ LCD Vendor Page Layout
To show only LCD fields
- ☐ Plasma Vendor Record Type
To show only plasma fields

Cancel Next

New Deal Detail: LED Vendor Record Type

Information

* Deal ID	↶
DD007	
Price	↶
\$75,676	
Product Type	↶
LED	▼
LED Service Vendor Phone	↶
758437855	

Owner

 Tom Stewart

Record Type

LED Vendor Record Type

Cancel

Save & New

Save

Logged in as Tom Stewart (raut.mrunali.madhusudan@gmail.com) [Log out as Tom Stewart](#)



Home Appliance A...

Home

Deal Details ▾


Q Search...



Deal Detail
DD007

Related

Details

Deal ID	↶
DD007	
Price	↶
\$75,676	
Product Type	↶
LED	
LED Service Vendor Phone	↶
758437855	
Record Type	↶
LED Vendor Record Type	
Created By	
 Tom Stewart, 2/10/2023, 12:33 AM	

Owner

 [Tom Stewart](#)

Last Modified By

 [Tom Stewart](#), 2/10/2023, 12:33 AM

Deal Detail
DD007

Related **Details**

* Deal ID

DD007

Owner

 Tom Stewart

Price

\$75,676

Product Type

LCD

LED Service Vendor Phone

758437855

Record Type

LED Vendor Record Type

Created By

 Tom Stewart, 2/10/2023, 12:33 AM

Last Modified By

 Tom Stewart, 2/10/2023, 12:33 AM


Cancel

Save



Home Appliance A...

Home

Deal Details 

Deal Detail
DD007

Related **Details**

Deal ID

DD007

Owner

 [Tom Stewart](#)

Price

\$75,676

Product Type

LCD

Record Type

LCD Vendor Page Layout

LCD Warranty Number

Created By

 [Tom Stewart](#), 2/10/2023, 12:33 AM

Last Modified By

 [Tom Stewart](#), 2/10/2023, 12:34 AM