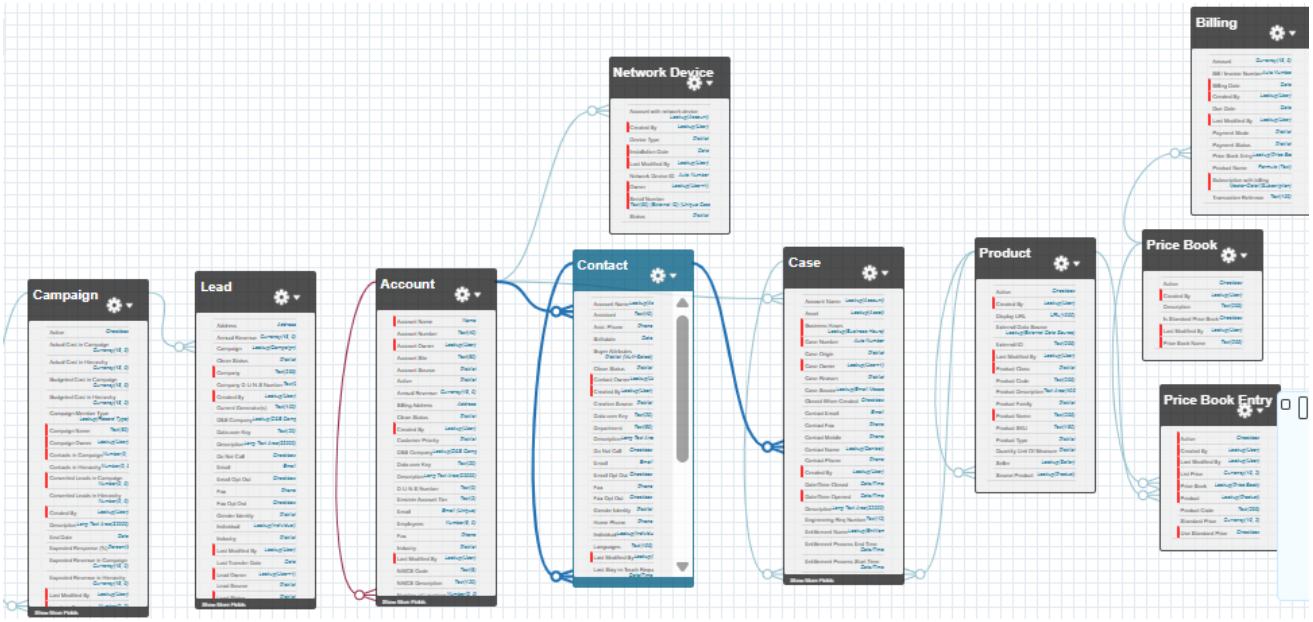
Create an IMS App and Add required Tabs. Learn about Standard and Custom Objects.

Note: Inside this app only I have implemented all week 6 daily tasks

I have created an IMS App in salesforce Light Experience. To create custom IMS app i have followed the below steps:

1. First analyzed the IMS app requirements understand the purpose
2. List down the useful requirement Standard and Custom objects
    a. Standard Objects
        i. **Campaigns** - Tracks marketing activities to attract customers.
        ii. Lead - A person or company who might buy from you.
        iii. Accounts - Stores information about companies or organizations.
        iv. Contact - Stores details of people linked to those companies.
        v. Opportunities - Tracks possible sales or deals.
        vi. Cases - Keeps a record of customer problems or complaints.
        vii. Products - Plan Items or services you sell.
        viii. Price books - shows prices of products for different customers.
    b. Custom Objects
        i. Network Devices - Stores details of devices used in your network, like routers
        ii. Billing - Keeps records of customer bills, payments, and charges for services.
3. Created required **custom objects with required fields**
4. Created Tabs for **custom objects** with icons
5. Created a **custom IMS App** by going to app manager in Setup
6. Added App name, logo, tagline.
7. Then added all the list of **tabs** that are made as list as above both **custom and standard objects**
8. After that started working on **custom fields** implanted **validation rules** on billing custom object fields and **field dependency** in Network devices.
9. Then created relationships among the objects whereas standard objects have some **default relationships and added my own custom relationship with custom objects** as shown below **Schema.**



10. Created **page layouts** for my custom objects and for related Objects
11. Created **min-page layouts**
    a. used primarily to display information when users hover over a field in the "Recent Items" section of the sidebar or lookup fields on other records.
    b. created as a subset of an existing full-page layout.
    c. Changes made to the mini page layout only affect the hover details and console views, not the main page layout itself
12. Similarly modified the **related list the page layout view** fields for easy to view related basic info and
13. Added for all objects required highlight panel fields using **compact layout.** It defines a limited set of key fields that appear in the "highlights panel" at the top of a record page in Lightning Experience and the mobile app
14. By default, account has some global picklist available like country, state so I didnt used any my own global picklist in my app i have used different data types and pick list and field decency on the custom picklist in network device custom object
15. I have **created a global action** button for network devices to create a new network device type fast using global action button and also **created a object specific action** for billing using this we can create a generate a new bill.
16. Added **lookup filter** on Network device custom object where it will show only filter data.
17. Created **formula fields** for date and amount in billing and **account info as a text formula** filed in billing object
18. Created a **advanced formula** field for **discount field on billing object.** Based on **amount+discount = final price** will be shown in Billing Object
19. Added rollup summary field on Account -> Actual customers
    a. Rollup summary fields are only possible on Master-detail relationship type of object side only. Eg: Account is master – detail hierarchy with account itself in that case we can ably create rollup summary field on account side or if any other object many

sides is there, we can create rollup summary field of parent fields inside the child many side

20. Created a faulty profile and added a new user front-desk manager and given certain permissions like can able
    a. Read only – price book info, product info and Network devices details
    b. Read/edit - cases and Bills but cannot delete
    c. Read / edit / delete – opportunity
    d. Create / edit / delete – contact but cannot see previous contacts
21. I change my domain name from default salesforce to my own domain name https://parrotrakhy-dev-ed.develop.my.salesforce.com/
22. Now finally the conclusion is I created two users and given permission set for only one user after created my complete app and given different level of access as mentioned in Point no.20