

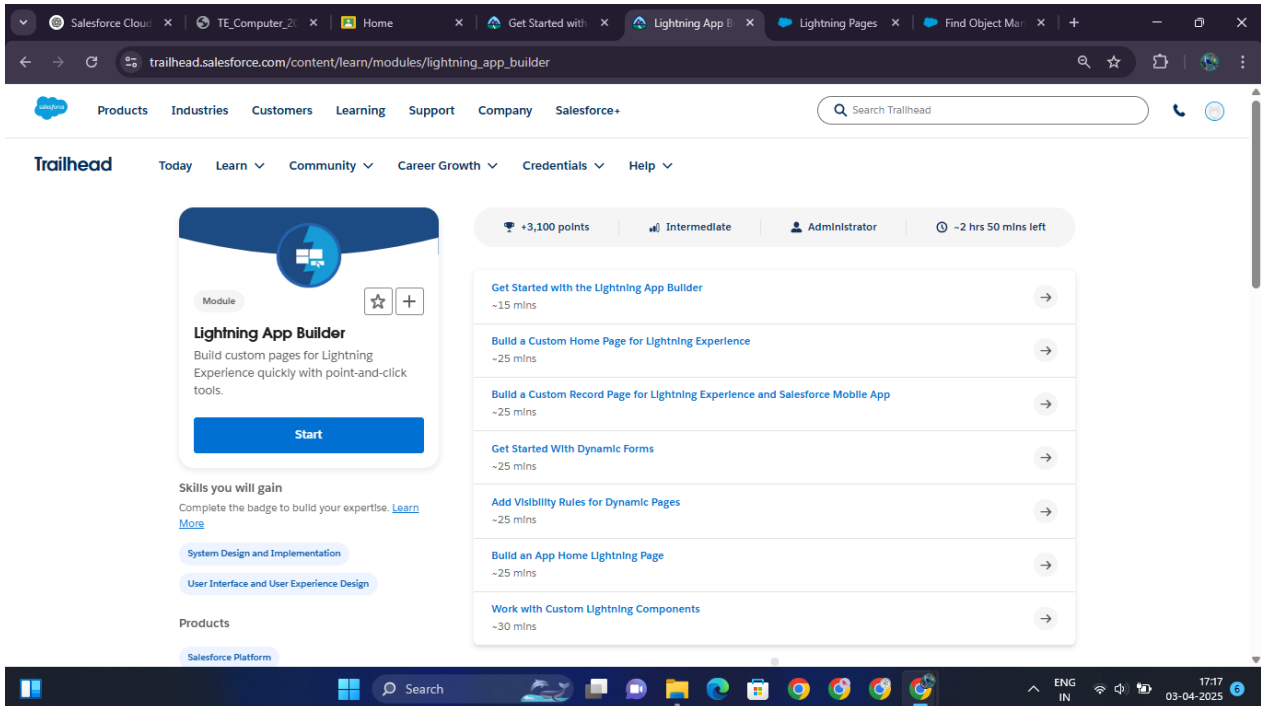
Name: **Piyusha Rajendra Supe**

Enrolment Number: **23CO315** (TE-B)

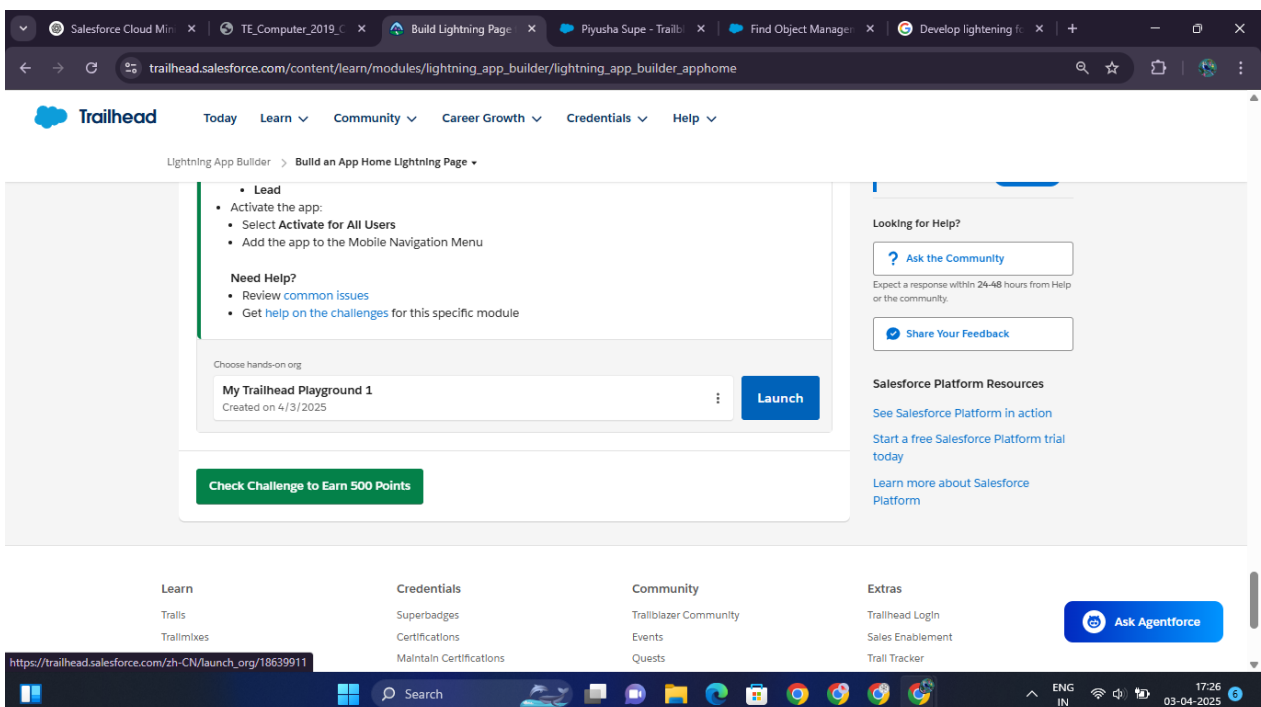
## **Practical 04**

**Aim:** Design and develop custom application using Salesforce cloud

**Step 1: Navigate to your trailhead salesforce account and search for lightning app builder**



**Step 2: Launch your playground for creation of your app**



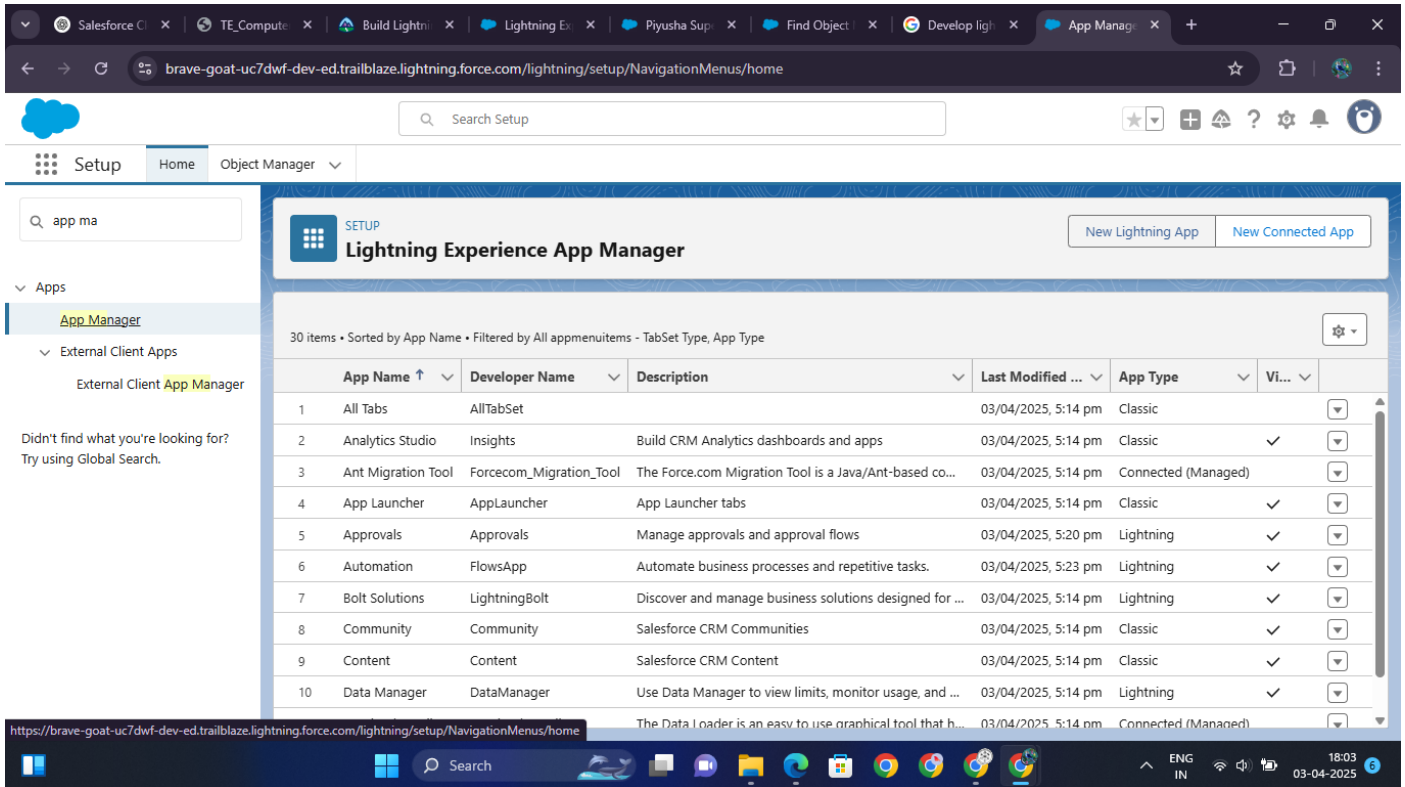
### Step 3: This will be your trailhead dashboard

The screenshot displays the Salesforce Trailhead Playground Starter interface. At the top, a navigation bar includes 'Playground Starter', 'Welcome', 'Install a Package', and 'Get Your Login Credentials'. The main content area features a large illustration of a character in a hoodie holding a laptop, with the text 'WELCOME, PIYUSHA' below it. A message states: 'This is your Trailhead Playground, where you can complete hands-on challenges for Trailhead, and try out new Salesforce features and customizations.' Below this, a video player titled 'Getting Started with Incident Management' is shown. A sidebar on the right contains a notification titled 'Stay ahead of incidents' with a 'Get Started' button. The browser's address bar shows the URL 'brave-goat-uc7dwf-dev-ed.trailblaze.lightning.force.com/lightning/n/trihdtps\_Welcome'. The Windows taskbar at the bottom shows the time as 17:28 on 03-04-2025.

### Step 4: Now open your playground through the dashboard

The screenshot displays the Salesforce Setup page. The browser address bar shows the URL 'brave-goat-uc7dwf-dev-ed.trailblaze.lightning.force.com/lightning/setup/SetupOneHome/home'. The page features a 'SETUP Home' header with a 'Create' button. Below the header, there are three main cards: 'Get Started with Einstein Bots' (with a 'Get Started' button), 'Mobile Publisher' (with a 'Learn More' button), and 'Join the Trailblazer Community' (with a 'Join Now' button). A sidebar on the left contains a search bar and a list of setup categories, including 'Feature Settings', 'Service', 'Field Service', 'Field Service Mobile', 'Field Service Mobile App Builder', 'User Interface', and 'Lightning App Builder'. The Windows taskbar at the bottom shows the time as 17:39 on 03-04-2025.

## Step 5: Navigate to the app manager of Lightning salesforce



brave-goat-uc7dwf-dev-ed.trailblaze.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app ma

Apps

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for? Try using Global Search.

SETUP Lightning Experience App Manager

New Lightning App New Connected App

30 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified	App Type	Vi...
1	All Tabs	AllTabSet		03/04/2025, 5:14 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	03/04/2025, 5:14 pm	Classic	✓
3	Ant Migration Tool	Forcecom_Migration_Tool	The Force.com Migration Tool is a Java/Ant-based co...	03/04/2025, 5:14 pm	Connected (Managed)	
4	App Launcher	AppLauncher	App Launcher tabs	03/04/2025, 5:14 pm	Classic	✓
5	Approvals	Approvals	Manage approvals and approval flows	03/04/2025, 5:20 pm	Lightning	✓
6	Automation	FlowsApp	Automate business processes and repetitive tasks.	03/04/2025, 5:23 pm	Lightning	✓
7	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for ...	03/04/2025, 5:14 pm	Lightning	✓
8	Community	Community	Salesforce CRM Communities	03/04/2025, 5:14 pm	Classic	✓
9	Content	Content	Salesforce CRM Content	03/04/2025, 5:14 pm	Classic	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and ...	03/04/2025, 5:14 pm	Lightning	✓

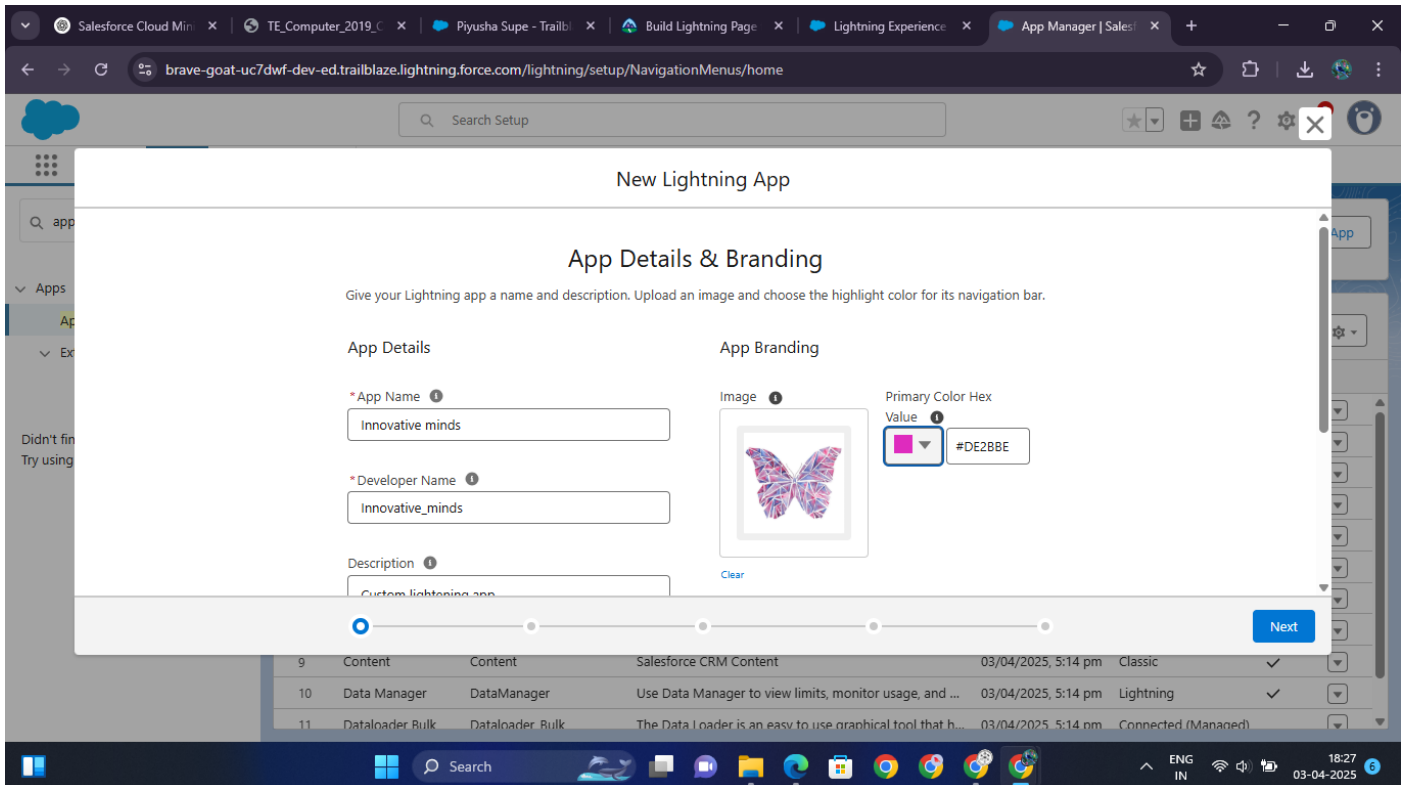
The Data Loader is an easy to use graphical tool that h... 03/04/2025, 5:14 pm Connected (Managed)

https://brave-goat-uc7dwf-dev-ed.trailblaze.lightning.force.com/lightning/setup/NavigationMenus/home

Search

ENG IN 18:03 03-04-2025

## Step 6: Click on create “new lightning app” and configure details of your app



brave-goat-uc7dwf-dev-ed.trailblaze.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app ma

Apps

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for? Try using Global Search.

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

Innovative minds

\* Developer Name

Innovative\_minds

Description

Custom lightning app

App Branding

Image

Primary Color Hex

Value

#DE28BE

Next

9 Content Content Salesforce CRM Content 03/04/2025, 5:14 pm Classic ✓

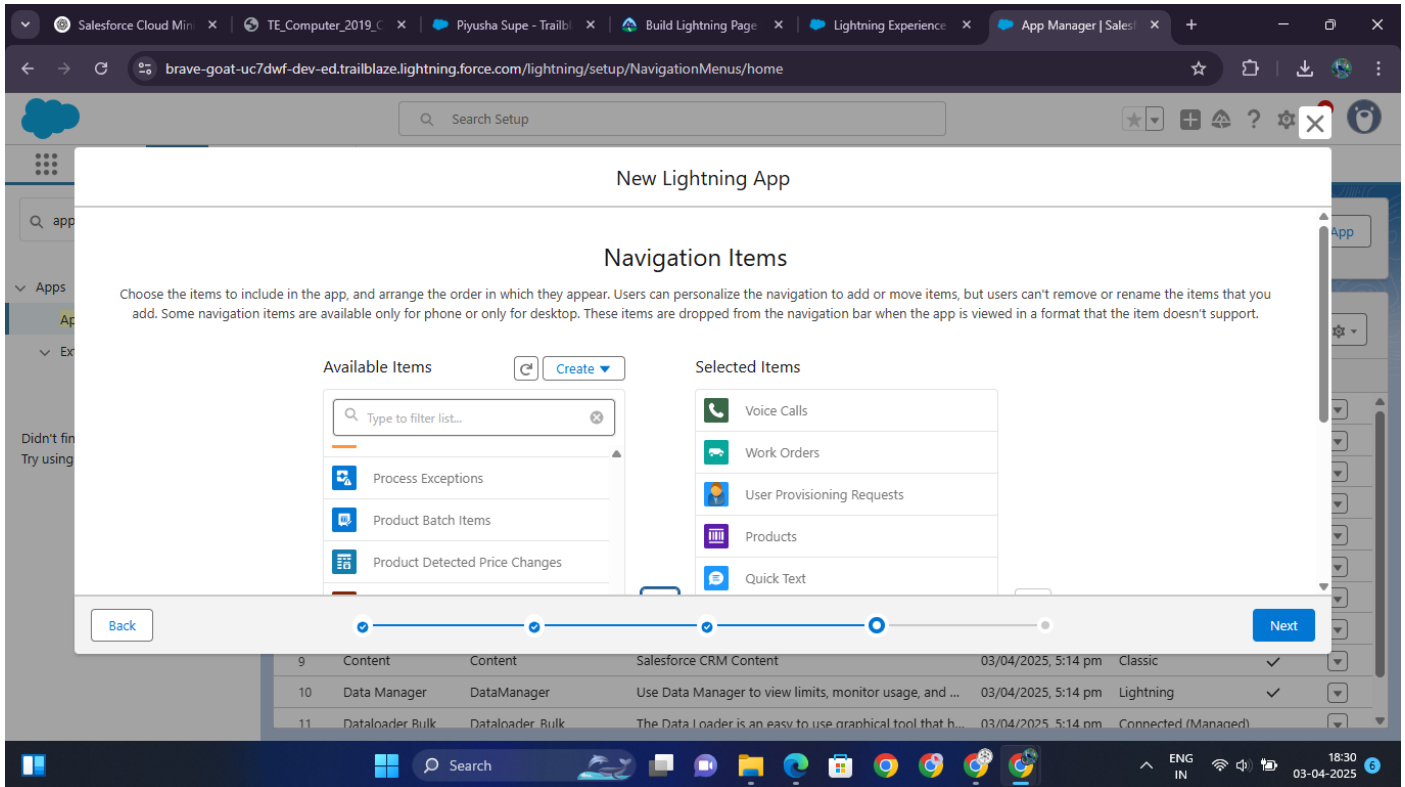
10 Data Manager DataManager Use Data Manager to view limits, monitor usage, and ... 03/04/2025, 5:14 pm Lightning ✓

11 Dataloader.Bulk Dataloader.Bulk The Data Loader is an easy to use graphical tool that h... 03/04/2025, 5:14 pm Connected (Managed)

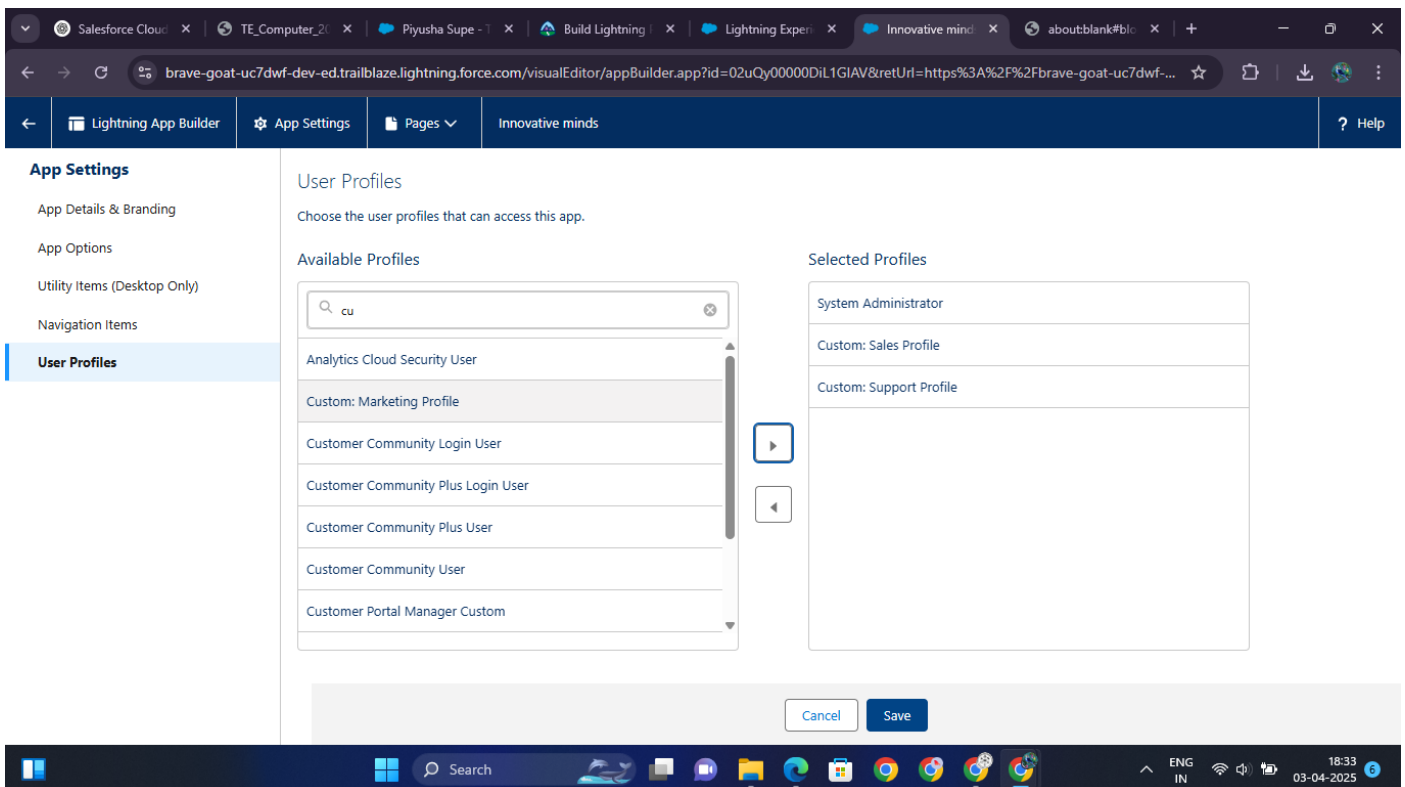
Search

ENG IN 18:27 03-04-2025

## Step 7: select the navigation items for your custom app according to use case



## Step 8: Then select the user profiles to which you want your app to be visible (make sure system administrator is included otherwise app won't be visible in the manager)



**Step 9: Now as you can see the app is visible in app manager, open the grid of dots in the left corner and search for your app and launch it**

Search Setup

Setup Home Object Manager

app manage

Apps

App Manager

External Client Apps

External Client App Manager

Didn't find what you're looking for? Try using Global Search.

32 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified	App Type	Vis...
9	Content	Content	Salesforce CRM Content	03/04/2025, 5:14 pm	Classic	
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and ...	03/04/2025, 5:14 pm	Lightning	✓
11	Dataloader Bulk	Dataloader_Bulk	The Data Loader is an easy to use graphical tool that h...	03/04/2025, 5:14 pm	Connected (Managed)	
12	Dataloader Partner	Dataloader_Partner	The Data Loader is an easy to use graphical tool that h...	03/04/2025, 5:14 pm	Connected (Managed)	
13	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	03/04/2025, 5:14 pm	Lightning	✓
14	Force.com IDE	Forcecom_IDE	The Force.com IDE is a powerful client application for ...	03/04/2025, 5:14 pm	Connected (Managed)	
15	Innovative minds	Innovative_minds	Custom lightening app	03/04/2025, 6:31 pm	Lightning	✓
16	Lightning Usage ...	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experi...	03/04/2025, 5:14 pm	Lightning	✓
17	Marketing CRM ...	Marketing	Track sales and marketing efforts with CRM objects.	03/04/2025, 5:14 pm	Classic	✓
18	My Service Journ...	MSJApp	Discover new customer service capabilities.	03/04/2025, 5:23 pm	Lightning	✓
19	Piyusha	Piyusha	Simple app	03/04/2025, 6:16 pm	Lightning	✓

**Step 10: This is how the app will be launched (my app name is Innovative minds and I have entered the product in my application of product inventory)**

Search...

Innovative minds Work Orders User Provisioning Requests Products Quick Text Accounts Contacts

Product Robot

Product Code 87878 Product Family None

Product "Robot" was created.

New Contact New Opportunity New Case

Related Details

Product Name Robot

Product Code 87878

Created By Piyusha Supe, 03/04/2025, 6:37 pm

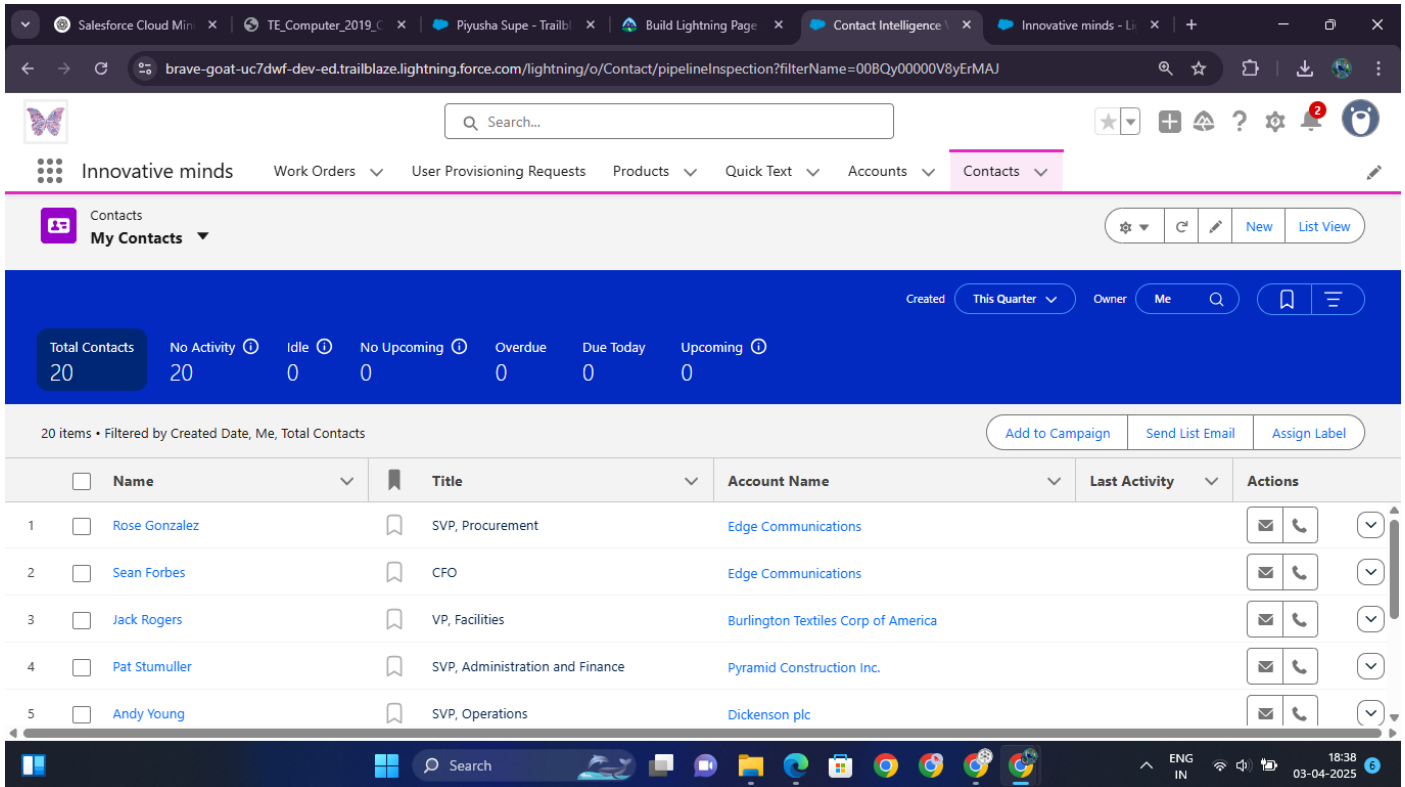
Product Description helper robot

Active ☒

Product Family None

Last Modified By Piyusha Supe, 03/04/2025, 6:37 pm

## Step 11: Here is the contact dashboard of my app



brave-goat-uc7dwf-dev-ed.trailblaze.lightning.force.com/lightning/o/Contact/pipelineInspection?filterName=00BQy00000V8yErMAJ

Search...

Innovative minds Work Orders User Provisioning Requests Products Quick Text Accounts **Contacts**

Contacts My Contacts

Created This Quarter Owner Me

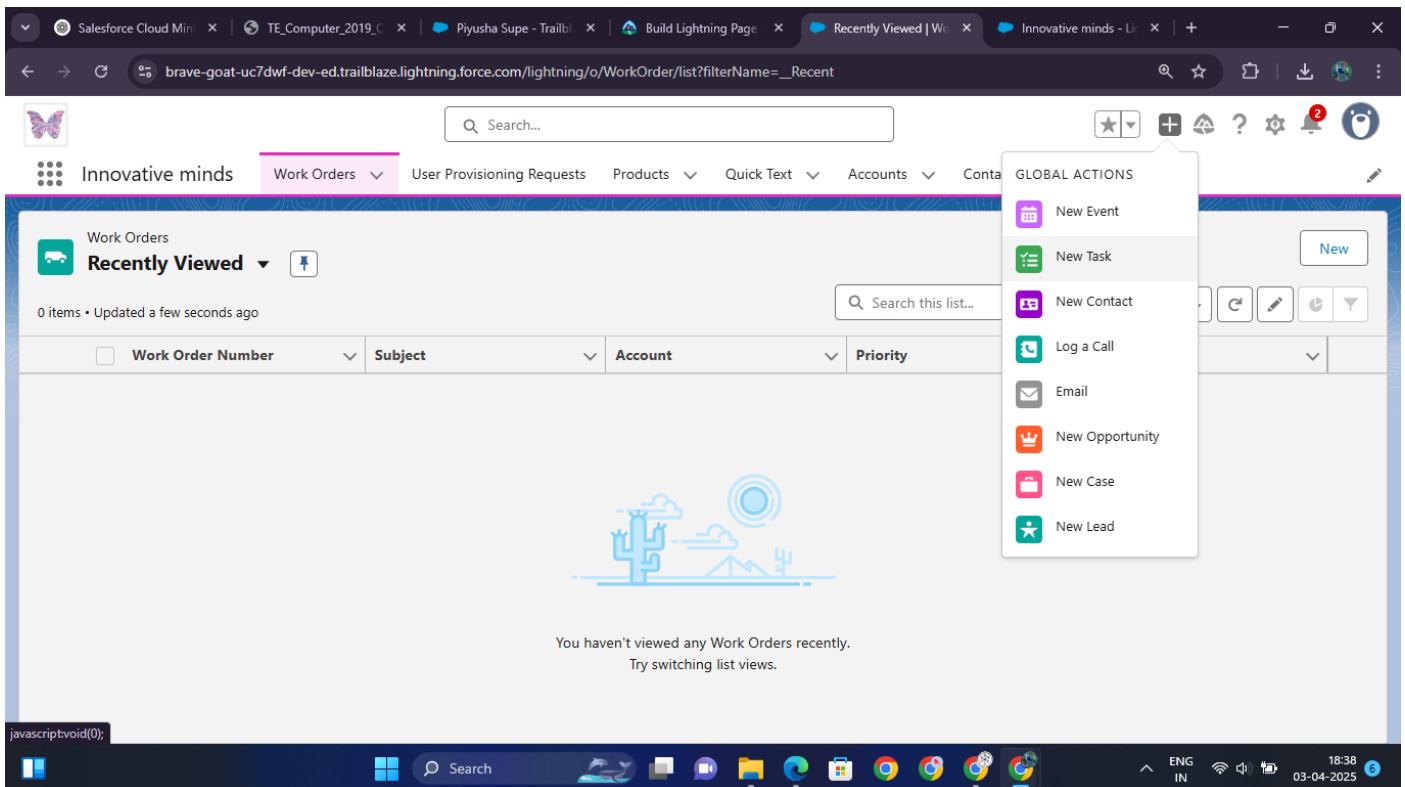
Total Contacts: 20, No Activity: 20, Idle: 0, No Upcoming: 0, Overdue: 0, Due Today: 0, Upcoming: 0

20 items • Filtered by Created Date, Me, Total Contacts

Add to Campaign Send List Email Assign Label

	Name	Title	Account Name	Last Activity	Actions
1	Rose Gonzalez	SVP, Procurement	Edge Communications		[Email] [Phone] [More]
2	Sean Forbes	CFO	Edge Communications		[Email] [Phone] [More]
3	Jack Rogers	VP, Facilities	Burlington Textiles Corp of America		[Email] [Phone] [More]
4	Pat Stumuller	SVP, Administration and Finance	Pyramid Construction Inc.		[Email] [Phone] [More]
5	Andy Young	SVP, Operations	Dickenson plc		[Email] [Phone] [More]

## Step 12: The global actions are visible in the menu of the app



brave-goat-uc7dwf-dev-ed.trailblaze.lightning.force.com/lightning/o/WorkOrder/list?filterName=\_\_Recent

Search...

Innovative minds Work Orders User Provisioning Requests Products Quick Text Accounts **Work Orders**

Work Orders Recently Viewed

0 items • Updated a few seconds ago

Search this list...

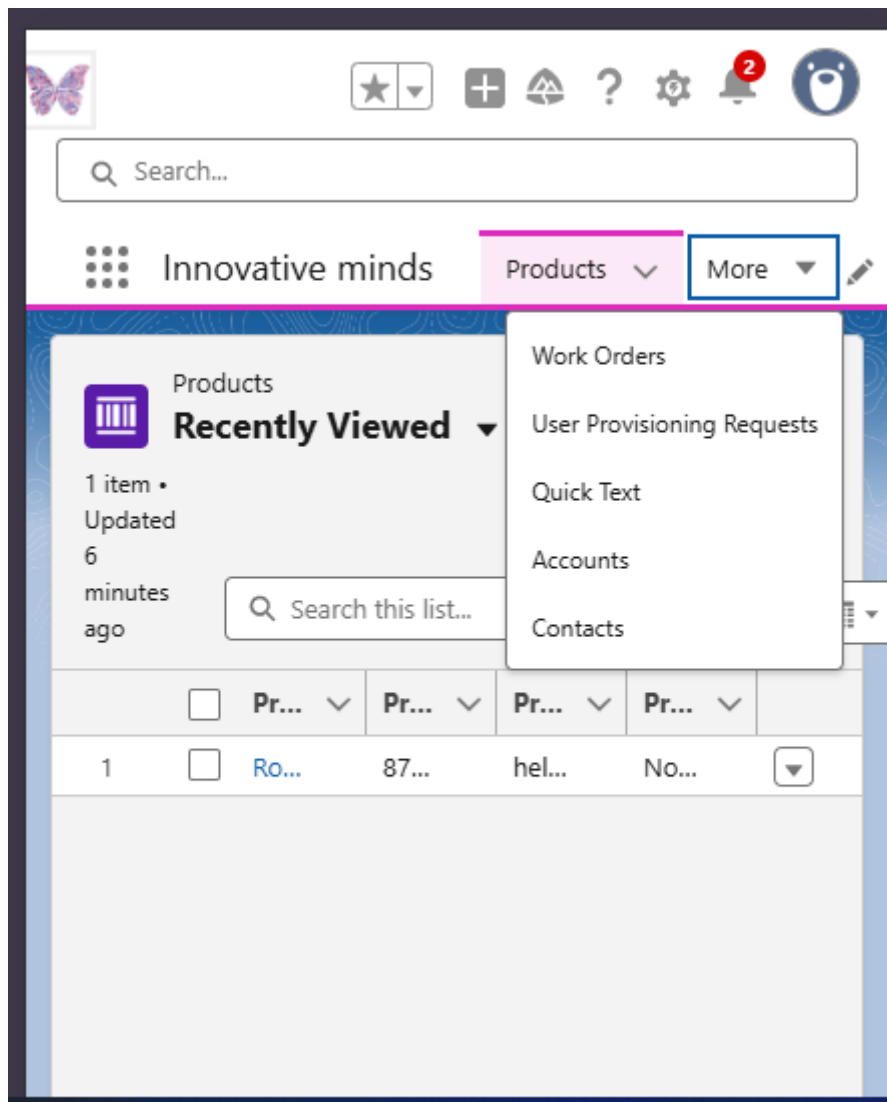
Work Order Number Subject Account Priority

GLOBAL ACTIONS

- New Event
- New Task
- New Contact
- Log a Call
- Email
- New Opportunity
- New Case
- New Lead

You haven't viewed any Work Orders recently. Try switching list views.

**Step 13: This is how the app will look in a mobile interface**



**Conclusion:** Thus I have successfully implemented an application on salesforce cloud using the lightning interface of trailhead Salesforce