

# NAAN MUDHALVAN

## SALESFORCE PROJECT REPORT

**COLLEGE: SCAD COLLEGE OF ENGINEERING AND TECHNOLOGY**

**BATCH NO- 18**

| NAME               | NM ID                            | REG NO       |
|--------------------|----------------------------------|--------------|
| NAGARAJ S          | 8F9BF1D55AAB6AF9658488A655AD9E77 | 952820114016 |
| NALLA KANNU S      | DA83E97D1464895A84A4302446F4BDED | 952820114343 |
| SANTHANA VASANTH S | 398FCF6528CF9C99F4448468F1680995 | 952820114351 |
| RAJMANI D          | 9EF5365A97741C283C3459B086DD2B11 | 952820114350 |

## STEP 1: CREATE A SALESFORCE ACCOUNT

The screenshot shows a Salesforce user profile for 'Raj Mani'. The profile includes a profile picture of a cat, a bio that says 'Share your awesomeness with the world. (Or at least with your colleagues on Chatter.)', and a 'Details' section with an 'About' tab. A 'Try Out the Compact Setting' dialog box is open on the right, showing a comparison of content density. The browser address bar shows 'connect-app-2989.lightning.force.com/lightning/r/User/0055g00000lh5fNAAV/view'.

connect-app-2989.lightning.force.com/lightning/r/User/0055g00000lh5fNAAV/view

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Search...

organization Home Employees ▾ departments ▾ activities ▾ jhonson raj ▾ projects ▾ projects\_tasks ▾ warehouses ▾ sales orders ▾ dispatches ▾ Raj Mani ▾ X

**Raj Mani**

Share your awesomeness with the world.  
(Or at least with your colleagues on Chatter.)

**Details**

About

Name Title

History

Try Out the Compact Setting

See more without scrolling

Salesforce user research found that users overwhelmingly prefer the Compact density setting because it shows 30% more content on the page. You'll have all the information you need at a glance, without the extra whitespace.

Try It Out

## G

## STEP 2: CREATE THE OBJECTS ( Employee, Project )

The screenshot shows the Salesforce Object Manager page. The 'Employee' object is listed with the API name 'Employee\_\_c', type 'Custom Object', and description 'Employee working in this org'. The 'LAST MODIFIED' date is '19/10/2023' and it is 'DEPLOYED'. The browser address bar shows 'connect-app-2989.lightning.force.com/lightning/setup/ObjectManager/home'.

connect-app-2989.lightning.force.com/lightning/setup/ObjectManager/home

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Search Setup

Setup Home Object Manager ▾

**Object Manager**

1 Items, Sorted by Label

Q emplo Schema Builder Create ▾

| LABEL    | API NAME    | TYPE          | DESCRIPTION                  | LAST MODIFIED | DEPLOYED |
|----------|-------------|---------------|------------------------------|---------------|----------|
| Employee | Employee__c | Custom Object | Employee working in this org | 19/10/2023    | ✓        |



SETUP

## New Custom Object

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

Label

dispatch

Example: Account

Plural Label

dispatchs

Example: Accounts

Starts with vowel sound

☐

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

Object Name

dispatch

Example: Account

Description

Context-Sensitive Help Setting

☒

Open the standard Salesforce.com Help & Training window

☐

Open a window using a Visualforce page

Content Name

None ▾

Enter Record Name Label and Format

Home | Salesforce

Tabs | Salesforce

connect-app-2989.lightning.force.com/lightning/setup/CustomTabs/page?address=%2F01r5g000000efyU%2Fe%3FretURL%3D%252Fsetup%252Fui%252Fcusto...

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Search Setup

SetupHomeObject Manager

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Custom Tab Definition Edit

Custom Object Tab Information

Tab Labelwarehouses

Objectwarehouse

Tab StyleApple

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link--None--

Enter a short description.

Description

SaveCancel

Home | Salesforce

Tabs | Salesforce

+

connect-app-2989.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup...

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Search Setup

Setup Home Object Manager

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Tabs

Select an existing custom object or [create a new custom object now](#).

Object sales order

Tab Style Airplane

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link --None--

Enter a short description.

Description

Next Cancel

Home | Salesforce x App Manager | Salesforce x dispatch | Salesforce x +

connect-app-2989.lightning.force.com/lightning/setup/ObjectManager/0115g000003ErWK/FieldsAndRelationships/new

Choose your tool

Show notifications

Allow Black

Search Setup

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Setup Home Object Manager

SETUP > OBJECT MANAGER

dispatch

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

dispatch

## New Custom Field

Help for this Page

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label tracking ID

Please enter the maximum length for a text field below

Length 40

Field Name tracking\_ID

Description

Help Text

Home | Salesforce

App Manager | Salesforce

sales order | Salesforce

connect-app-2989.lightning.force.com/lightning/setup/ObjectManager/0115g000003ErWF/FieldsAndRelationships/new

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Maps

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Search Setup

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

sales order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

DateTime

Email

Geolocation

Number

Percent

Phone

Picklist

Picklist (Multi-Select)

Text

Text Area

Text Area (Long)

Text Area (Rich)

Text (Encrypted)

1

Allows users to enter a date and time, or pick a date from a popup calendar. When users enter a date with a popup calendar, the date and the time are entered into the DateTime field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

Allows users to enter any combination of letters and numbers and store them in encrypted form.

SETUP > OBJECT MANAGER

sales order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label

status

1

Values

☐ Use global picklist value set

☒ Enter values, with each value separated by a new line

open

hold

shipped

returned

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set



SETUP > OBJECT MANAGER

sales order

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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!](#)

▼ Hide Filter Settings

Filter Criteria

Insert Suggested Criteria

Field

Contact: Account ID

Operator

equals

Value / Field

Field

sales order: customer

AND

Begin typing to search for a field...

--None--

Value

Current Record

sales order: customer

Clear Filter Criteria

Clear

Clear

Add Filter Logic...

Filter Type

☒ Required. The user-entered value must match filter criteria.

If it doesn't, display this error message on save:

Value does not exist or does not match filter criteria.

Reset to default message

SETUP > OBJECT MANAGER

order data

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Details

Description

API Name  
order\_data\_\_c

Custom  
✓

Singular Label  
order data

Plural Label  
order datas

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings

Standard salesforce.com Help Window

Edit Delete

## Object Manager

### Account Validation Rule

[Back to Account Validation Rules](#) [Help for this Page](#)

|                         |  |  |                               |
|-------------------------|--|--|-------------------------------|
| Validation Rule Detail  |  | <a href="#">Edit</a> <a href="#">Clone</a> |                               |
| Rule Name               | phone_number_has                             | Active                                     | ✓                             |
| Error Condition Formula | LEFT(Phone,1)<>"+"                           | Error Location                             | Top of Page                   |
| Error Message           | phone number must begin with +(country code) |  |                               |
| Description             |  |  |                               |
| Created By              | Raj Mani, 22/10/2023, 1:21 am                | Modified By                                | Raj Mani, 22/10/2023, 1:21 am |
|                         |  | <a href="#">Edit</a> <a href="#">Clone</a> |                               |

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Flows | Salesforce

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Search Setup

SetupHomeObject Manager

flows

Process Automation

Flows

Identity

Login Flows

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

SETUP

Flows

Flow Trigger ExplorerNew Flow

Flow Definitions

All Flows

6 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago

| Flow Label                                  | Process Type      | Active                              | Templ...                            | Package State     | Packa... | Last ... | Last ... |
|---|-------------------|-------------------------------------|-------------------------------------|-------------------|----------|----------|----------|
| Create a Case                               | Screen Flow       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |          |          |          |
| Orchestration flow for Recurrence Scheduler | Autolaunched Flow | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |          |          |          |
| Pay Now with Products                       | Screen Flow       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |          |          |          |
| Recurrence Schedule Flow                    | Autolaunched Flow | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | Managed-Installed |          |          |          |
| Reset Password                              | Screen Flow       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |          |          |          |
| Verify Identity                             | Screen Flow       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | Managed-Installed |          |          |          |

Flow Builder

Activate Save As Save

New Resource

\* Resource Type

Variable

\* API Name

recordid

Description

\* Data Type

Text

☐ Allow multiple values (collection) ⓘ

Default Value

Enter value or search resources...

Availability Outside the Flow

Cancel

Done

Home | Salesforce

App Manager | Salesforce

sales app dashboard | Sales

Flows | Salesforce

Flow Builder

+

⌵

—

□

×

connect-app-2989.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Gmail

YouTube

Maps

Flow Builder

?

⌵

Select Elements

↶

↷

⚙

Auto-Layout

Run

Debug

Activate

Save As

Save

Toolbox

Manager

Search this flow...

New Resource

RESOURCES

Record (Single) Variables (1)

Account from get\_account\_record

Variables (1)

recordid

ELEMENTS

Get Records (1)

get\_account\_record

Screen Flow Start

get account rec  
Get Records

End

Condition Requirements

All Conditions Are Met (AND)

Field

Id

Operator

Equals

Value

recordid

+ 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)

1:52 AM

SETUP > OBJECT MANAGER

**warehouse**

Help for this Page ?

**Details**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types

Edit Custom Object

**warehouse**

Custom Object Definition Edit Save Save & New Cancel

**Custom Object Information** ⓘ = Required Information

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

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

Object Name  Example: Account

Description

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Buy Now

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 ⓘ  
sales\_app

\*Developer Name ⓘ  
sales\_app

Description ⓘ

App Branding

Image ⓘ  

Upload

Primary Color Hex  
Value ⓘ  

#0070D2

Next

Flow Category

Lightning Bolt Solutions

|   |              |              |  |                      |           |   |
|---|--------------|--------------|--|----------------------|-----------|---|
| 7 | Marketing    | Marketing    | Best-in-class on-demand marketing automation | 16/10/2023, 3:01 pm  | Classic   |   |
| 8 | organization | organization |  | 19/10/2023, 12:35 pm | Lightning | ✓ |
| 9 | Platform     | Platform     | The fundamental Lightning Platform           | 18/10/2023, 3:01 pm  | Classic   |   |



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App Manager | Salesforce

retail management application

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New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

sys

Selected Profiles

System Administrator

Back

Save & Finish

Flow Category

Lightning Bolt Solutions

7

Marketing

Marketing

Best-in-class on-demand marketing automation

18/10/2023, 3:01 pm

Classic

8

organization

organization

19/10/2023, 12:35 pm

Lightning

✓

9

Platform

Platform

The fundamental Lightning Platform

18/10/2023, 3:01 pm

Classic

| Related                      |  | Details                      |  |
|------------------------------|--|------------------------------|--|
| sales order Name             |  | Owner                        |  |
| so-0001                      |  | Raj Mani                     |  |
| customer                     |  |                              |  |
| praba                        |  |                              |  |
| Contact                      |  |                              |  |
| raj mani d                   |  |                              |  |
| Contact                      |  |                              |  |
| tony stark                   |  |                              |  |
| Created By                   |  | Last Modified By             |  |
| Raj Mani 22/10/2023, 1:31 am |  | Raj Mani 22/10/2023, 1:31 am |  |