

# Retail Management Application Using Salesforce -

## (DEV)

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.

### 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 screenshot shows the Salesforce Object Manager page. At the top, there's a search bar with the placeholder "Search Setup" and a "Search" button. Below the search bar, the "Object Manager" tab is selected. The main area displays a table with one item:

| LABEL     | API NAME    | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-----------|-------------|---------------|-------------|---------------|----------|
| Warehouse | Warehouse_c | Custom Object |             | 24/09/2023    | ✓        |

At the bottom of the page, there's a search bar with the placeholder "Type here to search" and a toolbar with various icons.

The screenshot shows the Salesforce Object Manager page for the "Sales order" custom object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main panel displays the "Details" section for the "Sales order" object. The details include:

- Description
- API Name: Sales\_order\_c
- Custom: ✓
- Singular Label: Sales order
- Plural Label: Sales orders
- Enable Reports: ✓
- Track Activities
- Track Field History
- Deployment Status: Deployed
- Help Settings
- Standard salesforce.com Help Window

At the bottom of the page, there's a search bar with the placeholder "Type here to search" and a toolbar with various icons.

Salesforce Setup screenshot showing the Object Manager for Dispatch/Tracking.

The URL in the browser is salesforcecom-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011sh0000027lWw/Details/view

The page title is Dispatch/Tracking.

The left sidebar shows the following sections:

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

The main Details section displays the following configuration:

| Setting             | Value                               |
|---------------------|-------------------------------------|
| Description         |                                     |
| API Name            | Dispatch_Tracking_c                 |
| Custom              | ✓                                   |
| Singular Label      | Dispatch/Tracking                   |
| Plural Label        | Dispatch/Trackings                  |
| Enable Reports      | ✓                                   |
| Track Activities    |                                     |
| Track Field History |                                     |
| Deployment Status   | Deployed                            |
| Help Settings       | Standard salesforce.com Help Window |

At the bottom, there is a search bar and system status information: 32°C Mostly sunny, 14:49, ENG, 24-09-2023.

# 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.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** The URL is salesforcecom-dev-ed.lightning.force.com/lightning/setup/CustomTabs/home. The page title is "Setup".
- Left Navigation:** Shows "User Interface" and "Tabs" under "Customize".
- Section:** "Custom Tabs".
- Text:** "You can create new custom tabs to extend Salesforce functionality or to build new application functionality." It describes three types of tabs: Custom Object tabs, Web tabs, and Visualforce tabs.
- Table:** "Custom Object Tabs" table.

| Action     | Label             | Tab Style  | Description |
|------------|-------------------|------------|-------------|
| Edit   Del | Dispatch/Tracking | Chalkboard |             |
| Edit   Del | Sales orders      | Bell       |             |
| Edit   Del | Warehouses        | Building   |             |

- Table:** "Web Tabs" table.

| Action                        | Label         | Tab Style | Description |
|-------------------------------|---------------|-----------|-------------|
| New                           | What Is This? |           |             |
| No Web Tabs have been defined |               |           |             |

- Table:** "Visualforce Tabs" table.

| Action | Label         | Tab Style | Description |
|--------|---------------|-----------|-------------|
| New    | What Is This? |           |             |

**Bottom:** A taskbar with icons for File, Search, and various applications. The system status bar shows "32°C Mostly sunny", "ENG", "14:50", and "24-09-2023".

# 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.

**Navigation Items**

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items**

- Alert Settings
- All Sites
- Alternative Payment Methods
- Analytics
- App Launcher
- Appointment Invitations
- Approval Requests
- Asset Action Sources

**Selected Items**

- Accounts
- Campaigns
- Leads
- Opportunities
- Contacts
- Products
- Warehouses
- Dashboards
- Dispatch/Trackings

**User Profiles**

Choose the user profiles that can access this app.

**Available Profiles**

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Custom: Marketing Profile
- Custom: Sales Profile
- Custom: Support Profile
- Customer Community Login User

**Selected Profiles**

- System Administrator

# 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.

This screenshot shows the Salesforce Object Manager interface. The top navigation bar has 'Setup' selected. The main area displays the 'Object Manager' section with a search bar containing 'disp'. A table lists one item: 'Dispatch/Tracking' (API Name: Dispatch\_Tracking\_c, Type: Custom Object). The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Label' column is sorted by Label. The 'Last Modified' column shows '27/04/2023'. The 'Deployed' column has a checkmark. Red numbers 1 through 5 are overlaid on the interface: 1 is at the top right, 2 is on the 'Object Manager' tab, 3 is on the 'Label' column header, 4 is on the 'Fields & Relationships' link in the sidebar, and 5 is on the 'New' button in the top right of the table.

This screenshot shows the 'Fields & Relationships' page for the Dispatch/Tracking object. The sidebar has 'Fields & Relationships' selected. The main area shows a table with two rows: 'Address' (Field Label) and 'Created By' (Field Label). The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Red numbers 4 and 5 are overlaid on the interface: 4 is on the 'Fields & Relationships' link in the sidebar, and 5 is on the 'New' button in the top right of the table.

|  |   |
|--|---|
| <input type="radio"/> Number   | Allows users to enter any number. Leading zeros are removed.  |
| <input type="radio"/> Percent  | Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.                     |
| <input type="radio"/> Phone  | Allows users to enter any phone number. Automatically formats it as a phone number.   |
| <input type="radio"/> Picklist   | Allows users to select a value from a list you define.  |
| <input type="radio"/> Picklist (Multi-Select)                              | Allows users to select multiple values from a list you define.  |
| <input checked="" type="radio"/> Text <span style="color: red;">6</span>   | Allows users to enter any combination of letters and numbers.   |
| <input type="radio"/> Text Area  | Allows users to enter up to 255 characters on separate lines.   |
| <input type="radio"/> Text Area (Long)                                     | Allows users to enter up to 131,072 characters on separate lines.   |
| <input type="radio"/> Text Area (Rich)                                     | Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.                                 |
| <input type="radio"/> Text (Encrypted) <span style="color: blue;">i</span> | Allows users to enter any combination of letters and numbers and store them in encrypted form.  |
| <input type="radio"/> 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. |
| <input type="radio"/> 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 Label  i

Please enter the maximum length for a text field below.

Length  7

Field Name  i

Description

Help Text

Now let's create the other fields and **we must choose the data types of the fields carefully.**

## 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.

**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:

- 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.

**Step 2. Choose the related object**

Select the other object to which this object is related.

Related To:  2

Step 2 of 6

Previous Next Cancel 3

**Step 3. Enter the label and name for the lookup field**

Field Label:  4

Field Name:  5

Description:

Help Text:

Step 3 of 6

Previous Next Cancel



# Create A Pick-List Field On Sales Order

1. From Setup, click Object Manager and select Sales order.
2. Click Fields & Relationships, then New.
3. Select Picklist as the Data Type and click Next.
4. For Field Label enter Status
5. Select Enter values, with each value separated by a new line and enter these values:
  - 6. Open
  - 7. Hold
  - 8. Shipped
  - 9. Returned
10. Click Next, Next, then Save & New.

This screenshot shows the Salesforce Object Manager. The top navigation bar has 'Setup' selected. The 'Object Manager' tab is highlighted with a red box and labeled '1b'. The search bar contains 'Sales'. The main table lists two objects: 'Promotion Segment Sales Store' and 'Sales order'. The 'Sales order' row is highlighted with a red box and labeled '1c'. The table columns are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

| LABEL                         | API NAME                   | TYPE            | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-------------------------------|----------------------------|-----------------|-------------|---------------|----------|
| Promotion Segment Sales Store | PromotionSegmentSalesStore | Standard Object |             |               |          |
| Sales order                   | 1c                         | Custom Object   |             | 27/04/2023    | ✓        |

This screenshot shows the 'Fields & Relationships' section for the Sales order object. The top navigation bar has 'Setup' selected. The 'Object Manager' tab is selected. The 'Sales order' object is selected. The 'Fields & Relationships' tab is highlighted with a red box and labeled '2a'. The 'New' button is highlighted with a red box and labeled '2b'. The table lists two fields: 'Contact' and 'Created By'. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

| FIELD LABEL | FIELD NAME | DATA TYPE       | CONTROLLING FIELD | INDEXED |
|-------------|------------|-----------------|-------------------|---------|
| Contact     | Contact_c  | Lookup(Contact) |                   | ✓       |
| Created By  | CreatedBy  | Lookup(User)    |                   |         |

The screenshot shows the Salesforce interface for creating a new field. On the left, a sidebar lists various options like Details, Fields & Relationships, Page Layouts, etc. The main area shows a list of field types:

- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist** (highlighted with a red box and labeled 3)
- Picklist (Multi-Select)
- Text

Below the field types, there's a detailed description for each type. In the 'Step 2. Enter the details' screen, the 'Field Label' is set to 'Status' (labeled 4). Under 'Values', the 'Enter values, with each value separated by a new line' option is selected (labeled 5). The input field contains the values: Open, Hold, Shipped, Returned (labeled 6,7,8,9). There are also several checkboxes: 'Use global picklist value set', 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set' (which is checked). The 'Field Name' is also set to 'Status'.

## 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.

The screenshot shows the 'Object API Data Types' section of the Salesforce setup. It lists several options:

- 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.
- Roll-Up Summary i: 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.
- Lookup Relationship** 1: 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.
- 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:
  - 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.
- External Object: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Sales order  
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To Account 2

Step 2

Previous Next Cancel 3

Previous Next Cancel

Field Label Customer 4

Field Name Customer 5

Description

Help Text

Previous Next Cancel

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

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.

The screenshot shows a list of relationship types:

- Formula
- Roll-Up Summary (i)
- Lookup Relationship 1
- Master-Detail Relationship
- External Object Relationship

Descriptions for each type:

- 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.
- 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.
- Lookup Relationship: 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.
- 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:
  - 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.
- External Object Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Sales order  
New Relationship

Help for this Page (?)

Step 2. Choose the related object Step 2

Previous Next Cancel

Select the other object to which this object is related.

Related To

Previous Next Cancel 3

|  |  |                   |   |
|--|--|-------------------|---|
| Field Label  | Contact  | <a href="#">i</a> | 4 |
| Field Name   | Contact  | <a href="#">i</a> |   |
| Description  |  |                   |   |
| Help Text  |  |                   |   |
| Child Relationship Name  | Sales_orders1  | <a href="#">i</a> |   |
| Required   | <input type="checkbox"/> Always require a value in this field in order to save a record  |                   |   |
| What to do if the lookup record is deleted?  | <input checked="" type="radio"/> Clear the value of this field. You can't choose this option if you make this field required.<br><input type="radio"/> Don't allow deletion of the lookup record that's part of a lookup relationship. |                   |   |
| Auto add to custom report type   | <input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity <a href="#">i</a>  |                   |   |
| <b>Lookup Filter</b>   |  |                   |   |
| Optionally, create a filter to limit the records available to users in the lookup field. <a href="#">Tell me more!</a> |  |                   |   |
| <a href="#">▶ Show Filter Settings</a> 5   |  |                   |   |

**Lookup Filter**

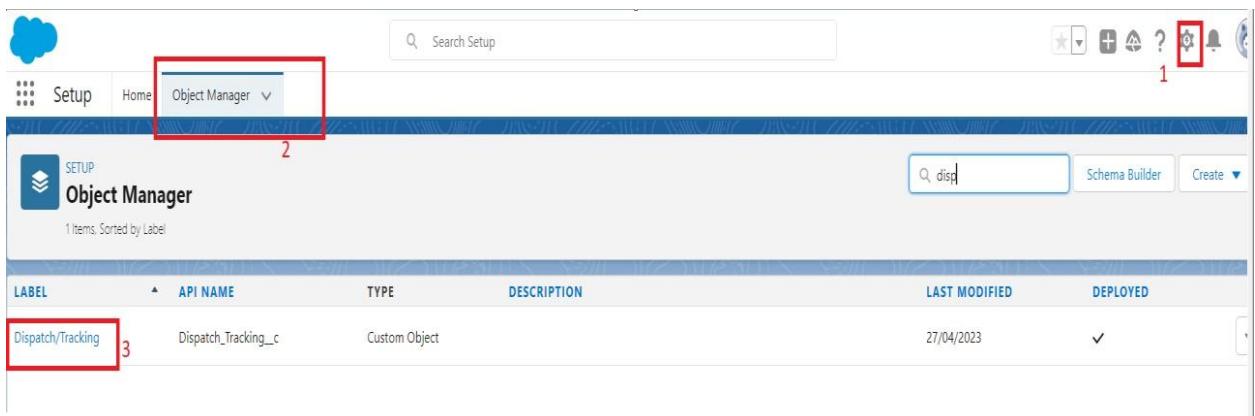
Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Hide Filter Settings](#)

| Filter Criteria  | Insert Suggested Criteria   | Clear Filter Criteria                  |                       |
|--|---|--|-----------------------|
| Field<br>Contact: Account ID   | Operator<br>equals  | Value / Field<br>Sales order: Customer | <a href="#">Clear</a> |
| AND<br>Begin typing to search for a field...                         | --None--  | Value                                  | <a href="#">Clear</a> |
| AND<br>Begin typing to search for a field...                         | --None--  | Value                                  | <a href="#">Clear</a> |
| <a href="#">Add Filter Logic...</a>                                  |   |  |                       |
| Filter Type  | <input checked="" type="radio"/> <b>Required.</b> The user-entered value must match filter criteria.<br><small>If it doesn't, display this error message on save:<br/>Value does not exist or does not match filter criteria.</small><br><a href="#">Reset to default message</a> |  |                       |
| <input type="radio"/> <b>Optional.</b>                               | 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.  |  |                       |
| Active   | <input checked="" type="checkbox"/> Enable this filter.   |  |                       |
| <a href="#">Previous</a> <a href="#">Next</a> <a href="#">Cancel</a> |   |  |                       |

## 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.



The screenshot shows the Salesforce Setup interface. At the top, there is a navigation bar with tabs: Setup (selected), Home, and Object Manager (highlighted with a red box). Below the navigation bar is a toolbar with various icons. The main area is titled "Object Manager" with a sub-header "1 items. Sorted by Label". A search bar contains the text "disp". A table lists one item:

| Label             | API Name            | Type          | Description | Last Modified | Deployed                            |
|-------------------|---------------------|---------------|-------------|---------------|-------------------------------------|
| Dispatch/Tracking | Dispatch_Tracking_c | Custom Object |             | 27/04/2023    | <input checked="" type="checkbox"/> |

Details

**Fields & Relationships** 4

Page Layouts

Lightning Record Pages

Fields & Relationships

11 Items, Sorted by Field Label

| FIELD LABEL | FIELD NAME  | DATA TYPE    | CONTROLLING FIELD | INDEXED |
|-------------|-------------|--------------|-------------------|---------|
| Address     | Address_c   | Text(50)     |                   |         |
| Created By  | CreatedById | Lookup(User) |                   |         |

New 5 Deleted Fields Field Dependencies Set History Tracking

- Checkbox Allows users to select a True (checked) or False (unchecked) value.
- Currency Allows users to enter a dollar or other currency amount and automatically formats the value for display in Excel or another spreadsheet.
- Date Allows users to enter a date or pick a date from a popup calendar.
- Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users enter a date and time into the Date/Time field, the date part is required and must be entered into the Date field.
- Email Allows users to enter an email address, which is validated to ensure proper format. If the user enters an invalid email address when clicking Send an Email, Note that custom email addresses cannot be used.

|             |            |  |
|-------------|------------|--|
| Field Label | Order date | <span style="border: 1px solid blue; padding: 2px;">i</span> |
| Field Name  | Order_date | <span style="border: 1px solid blue; padding: 2px;">i</span> |
| Description |            |  |
| Help Text   |            |  |

## 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.

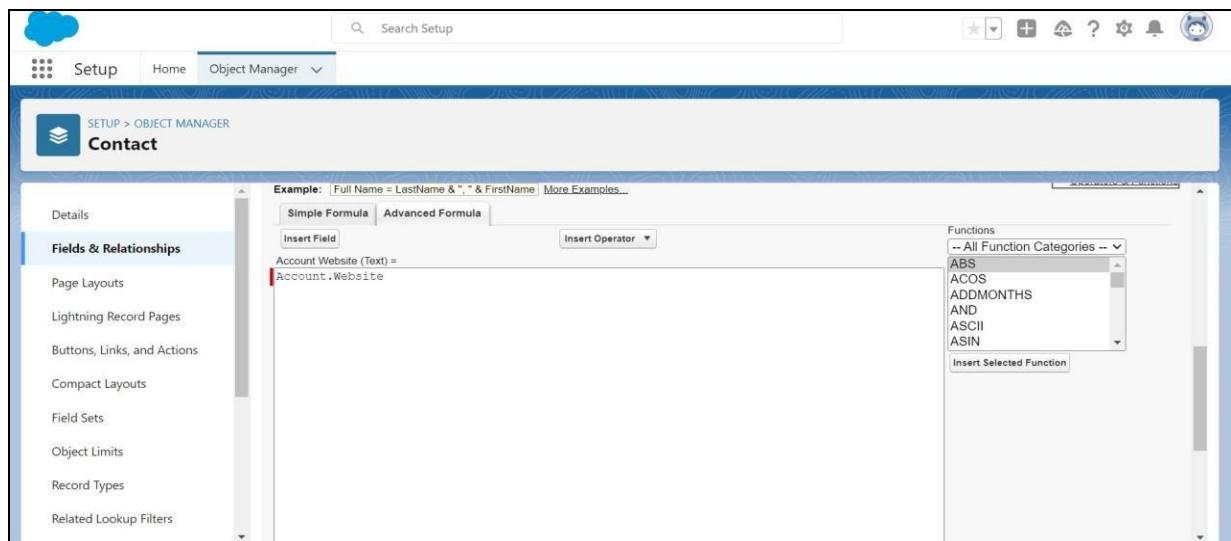
The screenshot shows the Salesforce Object Manager interface for the Contact object. The left sidebar has options like Details, Fields & Relationships (which is selected and highlighted with a blue box), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main area is titled 'Fields & Relationships' and shows a table of 31 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The first few rows show fields like Account Name, Account Website, Assistant, Asst. Phone, Birthdate, Clean Status, Contact Owner, and Created By. At the top right of the table header, there are buttons for New, Deleted Fields, Field Dependencies, and Set History Tracking. A date stamp '24 January 2023' is at the bottom right of the table.

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

The screenshot shows a modal dialog titled 'Data Type' in the Salesforce Object Manager for the Contact object. The left sidebar is the same as the previous screenshot. The modal has a heading 'Data Type' and a sub-heading 'Select one of the data types below'. It contains four options: 'None Selected' (radio button not selected), 'Auto Number' (radio button not selected), 'Formula' (radio button selected with a blue circle), and 'Roll-Up Summary' (radio button not selected). Below each option is a brief description. The 'Formula' option is described as a read-only field that derives its value from a formula expression defined. The 'Roll-Up Summary' option is described as 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.

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.



## Creating A User

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

The screenshot shows the 'Manage Users' page in the Salesforce Setup. A new user record is being created, with the following details:

- User Detail:**
  - Name: manager manager
  - Alias: mmanna
  - Email: gravanthi2k1@gmail.com (Verified)
  - Username: sravanthi2k1@gmail.com
  - Nickname: User1695533104202108728
  - Title:
  - Company:
  - Department:
  - Division:
  - Address:
  - Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)
  - Locale: English (India)
  - Language: English
  - Delegated Approver: Manager
  - Receive Approval Request Emails: Only if I am an approver
  - Federation ID:
- Role:** Marketing User
- User License:** Standard User
- Profile:** Standard User
- Activation Status:** Active

The sidebar on the left shows the following navigation categories: Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and **Users**. The 'Users' category is currently selected. Other sections like Feature Settings and Data.com are also visible.

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.

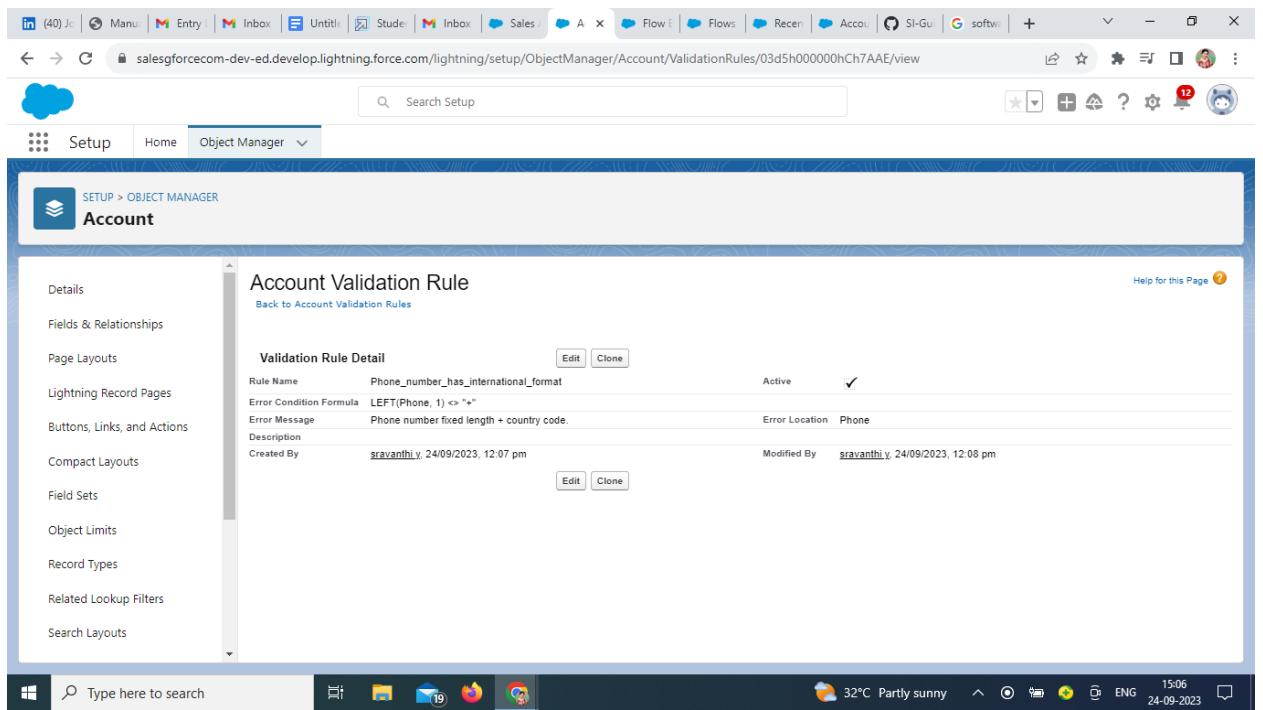
5. Select a User License as Salesforce

6. Select Standard User profile.

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.

## 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) <> "+" .

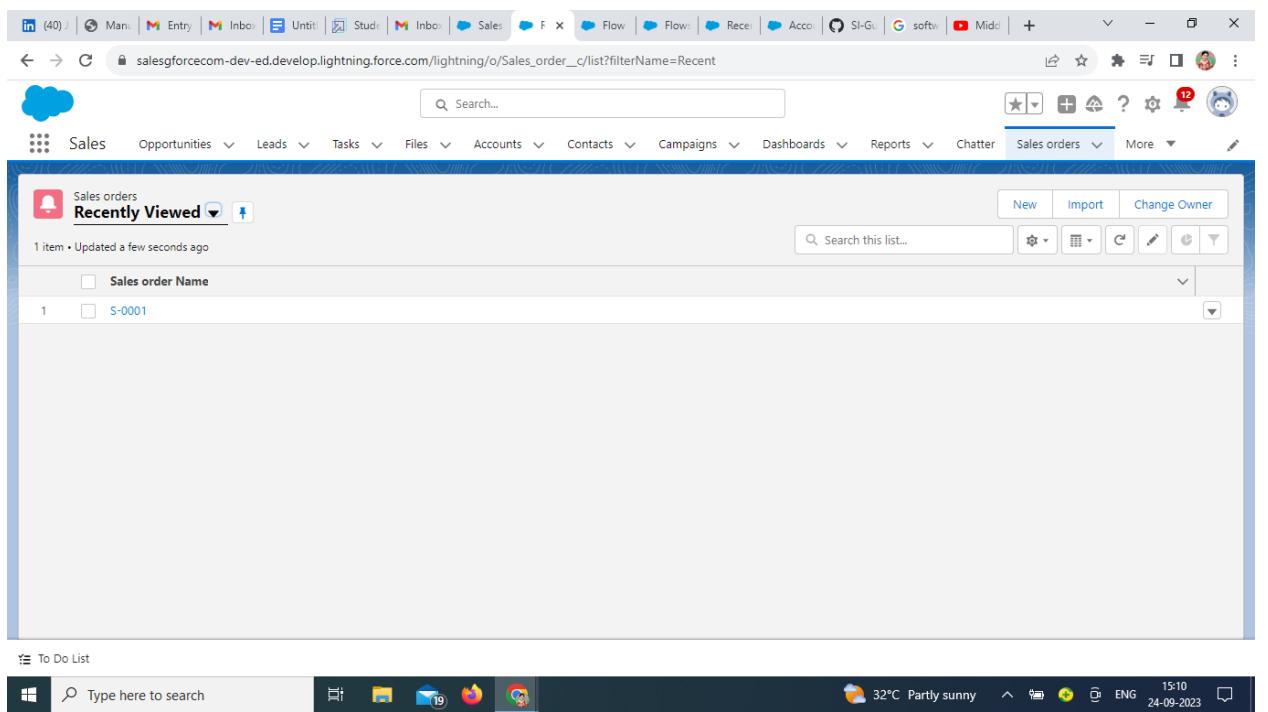
4.And in error message give the description has Phone number must begin with + (country code).

5.In error location select field.

6.Save

## 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



## Create Report

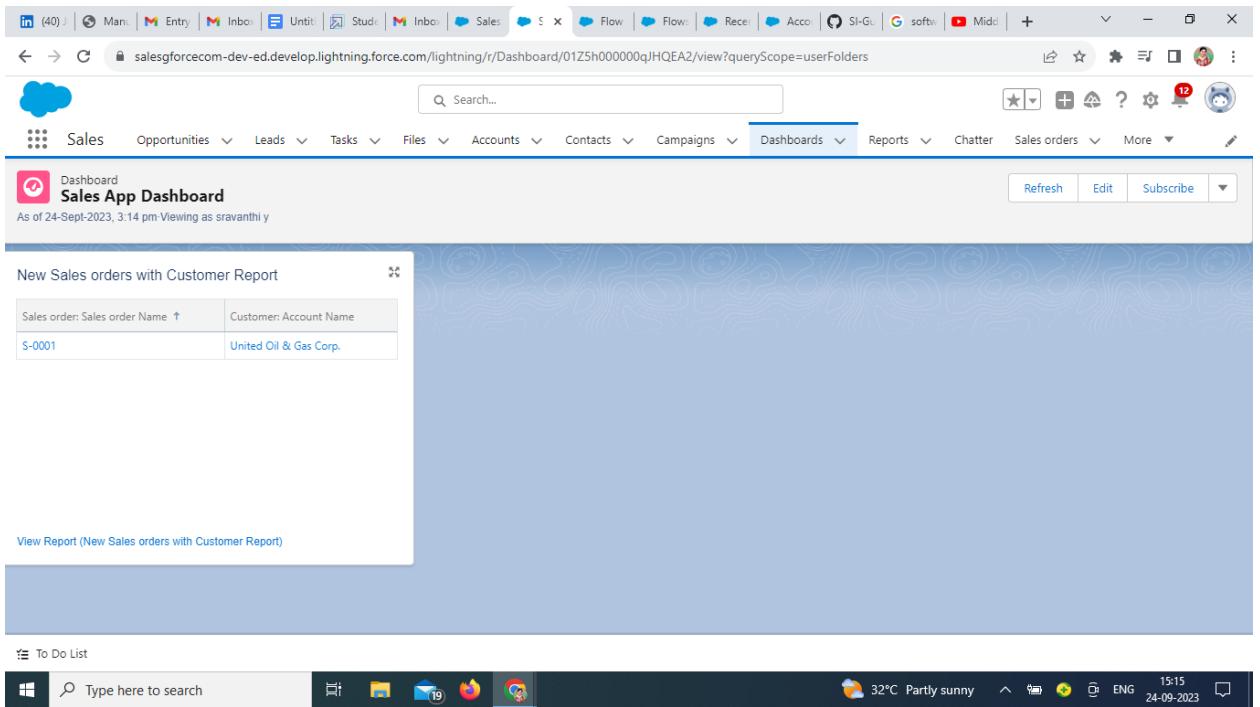
1. Click App Launcher and

2. Select Sales App
3. Click reports tab
4. Click New Report.

The screenshot shows the Salesforce Lightning interface. At the top, there's a navigation bar with various icons and links like 'Sales', 'Opportunities', 'Leads', etc. Below the navigation is a search bar and a toolbar with icons for 'Enable Field Editing', 'Add Chart', and 'Edit'. The main content area displays a report titled 'Report: Sales orders with Customer' and 'New Sales orders with Customer Report'. The report table has two columns: 'Sales order: Sales order Name' and 'Customer: Account Name'. There is one record listed: 'S-0001' under Sales order and 'United Oil & Gas Corp.' under Customer. At the bottom of the screen, there's a taskbar with a search bar, pinned apps, and system status information including weather (32°C, Partly sunny), date (24-09-2023), and time (15:15).

## Create Dashboard

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



## Flows

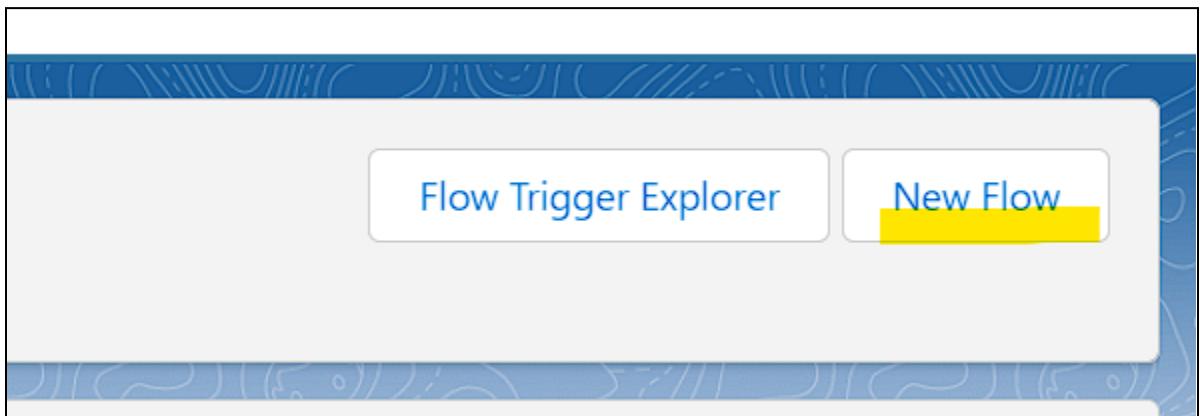
Flows are an automation tool provided by Salesforce which can be used to perform various tasks like, Sending an Email, Posting a chatter, Sending custom Notifications &, etc. Flow is the most powerful automation tool provided by Salesforce. It can be trigger for record insert, update and record delete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

## 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

New Flow

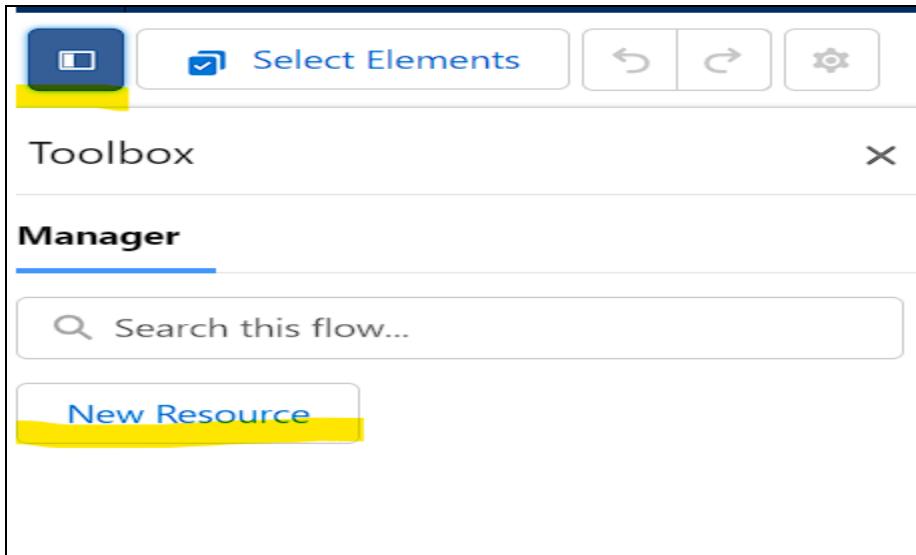
Core All + Templates

|   |   |
|---|---|
| <b>Screen Flow</b><br>Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.    | <b>Record-Triggered Flow</b><br>Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.                    |
| <b>Schedule-Triggered Flow</b><br>Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background. | <b>Platform Event—Triggered Flow</b><br>Launches when a platform event message is received. This autolaunched flow runs in the background.                |
| <b>Autolaunched Flow (No Trigger)</b><br>Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.   | <b>Record-Triggered Orchestration</b><br>Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process. |

Create

A screenshot of the "New Flow" creation interface. The title "New Flow" is at the top. Below it, a navigation bar shows "Core" and "All + Templates". The main area displays six flow types in cards: "Screen Flow" (selected and highlighted with a blue border), "Record-Triggered Flow", "Schedule-Triggered Flow", "Platform Event—Triggered Flow", "Autolaunched Flow (No Trigger)", and "Record-Triggered Orchestration". Each card contains a brief description. A "Create" button is located at the bottom right.

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

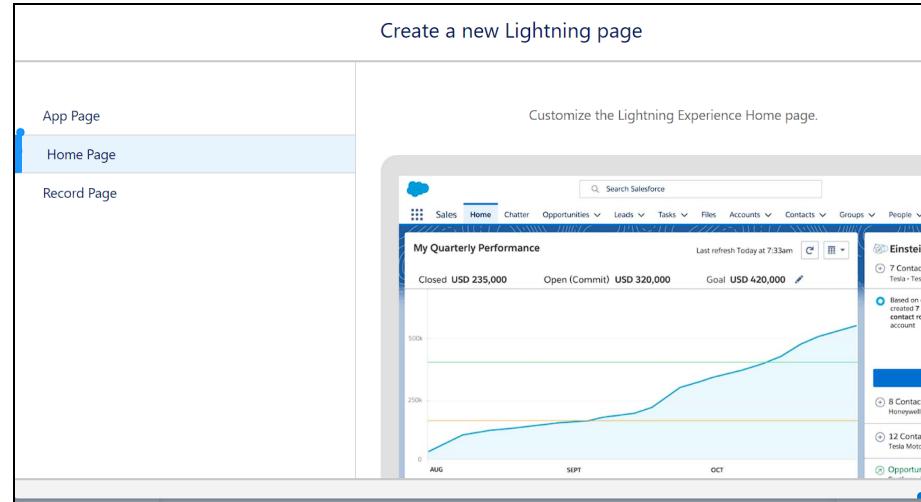
A screenshot of the 'New Resource' configuration dialog box. It has several input fields:

- \* Resource Type: Variable
- \* API Name: Recordid
- Description: (empty)
- \* Data Type: Text
- Allow multiple values (collection):
- Default Value: Enter value or search resources...

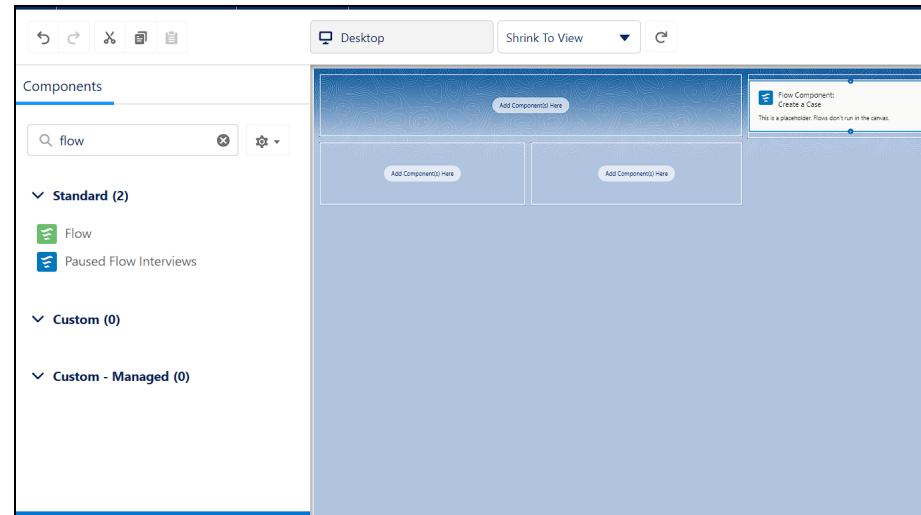
At the bottom right are 'Cancel' and 'Done' buttons.

## To Create Lightning Home Page

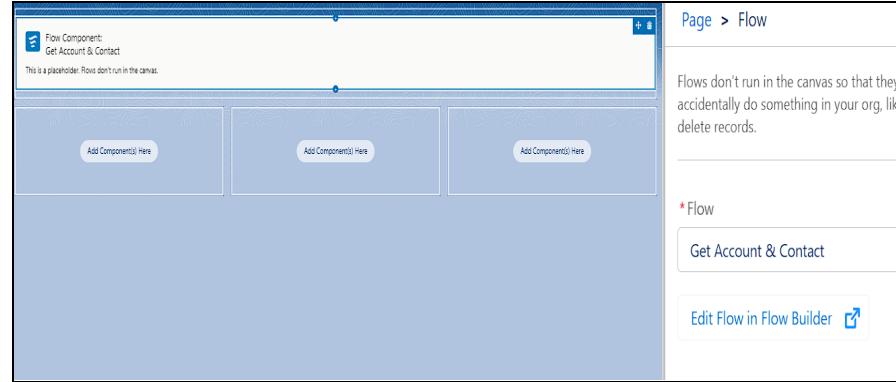
1. Click on setup gear.
2. Now search for lightning App builder.
3. And select New option
4. In create a new lightning page select Home page.



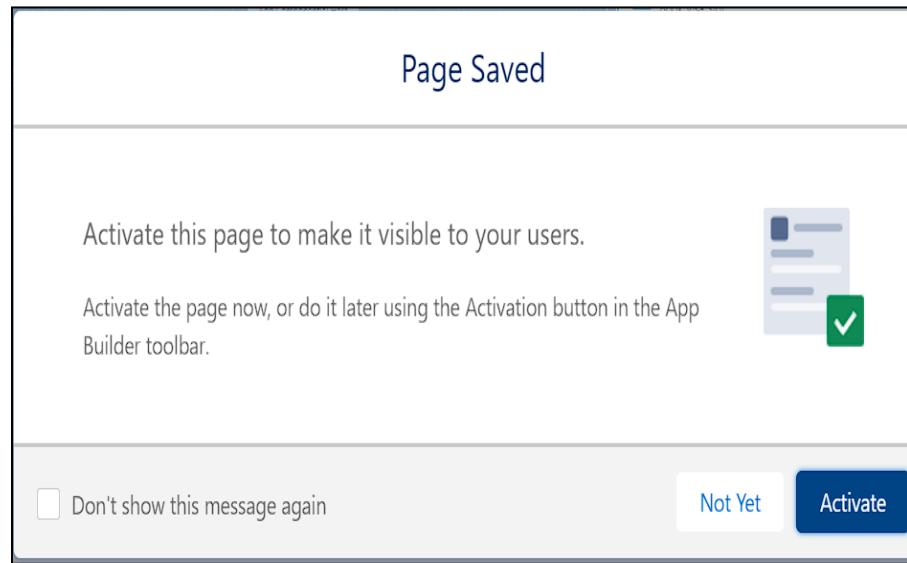
5. Select Next
6. Give the label name - Account & Contact
7. Choose a standard home page.
8. Now in the component section select flow and drag down it to Corner of the page.



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.

Activation: Account & Contact

 Any app and profile assignments are displayed for specified app and profile combinations, and they override all other assignments.

[Learn more about forecast page assignment in Salesforce Help.](#)

Org Default App Default App and Profile

Set the home page for different user profiles when they're using certain apps. These assignments are the most specific, and override all other home page assignments.

[Assign to Apps and Profiles](#)

[Close](#)

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) 1 Select

| 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 record... |
| <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)  |             | 3 Selected |
|--|-------------|------------|
| 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)

|  |
|--|
| <input type="checkbox"/> Accounts      |
| <input type="checkbox"/> Campaigns     |
| <input type="checkbox"/> Contacts      |
| <input type="checkbox"/> Leads         |
| <input type="checkbox"/> Opportunities |
| <input type="checkbox"/> Products      |

[Reset Navigation to Default](#)

Add Items

| Available Items |  |
|-----------------|--|
| Favorites       | 0 items selected   |
| All             | <a href="#">+ Digital Experiences Home</a><br><a href="#">+ Home</a> |

Canc

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](#)

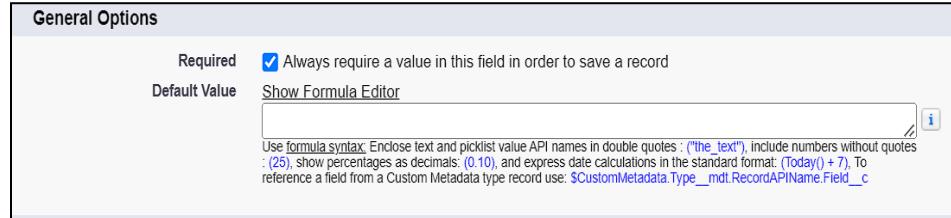
C

## 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.

## To Create Record Trigger Flow

To create record triggered flow

1. Click on setup and search for flows.
2. Than 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.

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

#### Actions and Related Flows

Update any record at any time. This more flexible flow runs in the background.

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

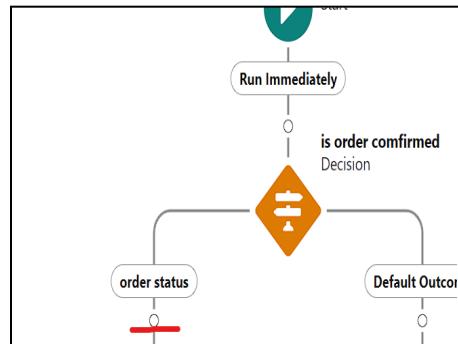
17. Value as Yes

18. Click on done

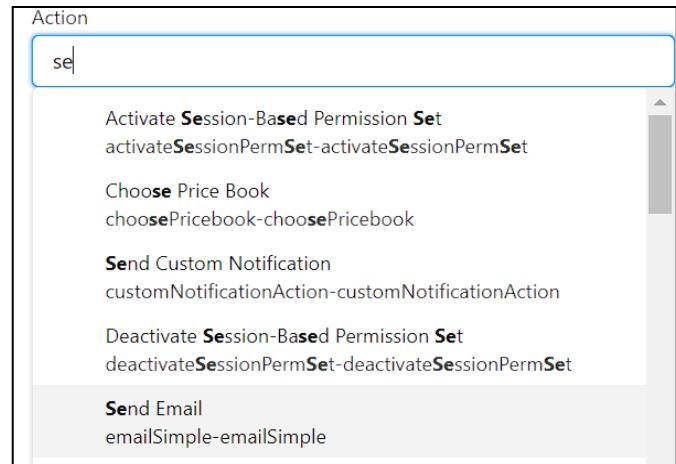
Edit Decision

|  |  |
|--|--|
| *Label<br>is order confirmed   | * API Name<br>is_order_confirmed   |
| 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 1 +<br>order status  | OUTCOME DETAILS<br>*Label<br>order status<br>*Outcome API Name<br>order_status<br>Default Outcome<br>Condition Requirements to Execute Outcome<br>All Conditions Are Met (AND) |
| Resource<br>\$Record > Order Confirmed X<br>Operator<br>Equals<br>Value<br>Yes<br>+ 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



21. Give the label as Send an email to customer
22. Now in body select \$Record and than 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 than 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

A\_a Body 

A\_a Email Template ID

 Log Email on Send

A<sub>a</sub> Email Template ID

Log Email on Send

A<sub>a</sub> Recipient Address Collection

A<sub>a</sub> Recipient Address List ⓘ

{\$Record.Email\_Id\_c}

A<sub>a</sub> Related Record ID

Rich-Text-Formatted Body

A<sub>a</sub> Sender Email Address

A<sub>a</sub> Sender Type

A<sub>a</sub> Subject ⓘ

Order confirmation

## 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');

            }

        }

    }

}

}
```

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

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

## 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. Sobject as Account.

Developer Console - Google Chrome

salesforcecom-dev-ed.develop.my.salesforce.com/\_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

avoiddup.apxt \* ToAvoidDuplicateHandler.apxc \*

Code Coverage: None API Version: 58

```
1 trigger avoiddup on Account (before insert) {
2     if(trigger.isBefore){
3         ToAvoidDuplicateHandler.preventDuplicate(trigger.new);
4     }
5
6
7
8
9 }
10
11
12
13
14 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

Type here to search

32°C Party sunny 15:23 24-09-2023

