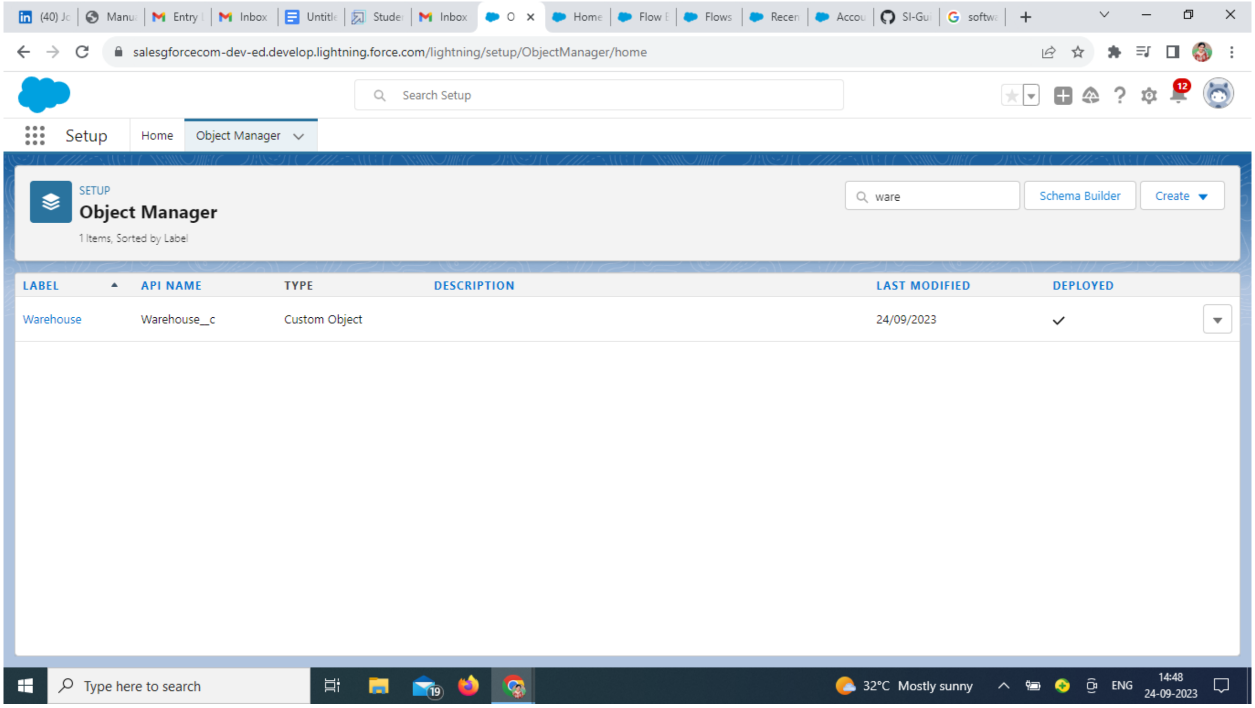
Retail Management Application Using Salesforce - (DEV)

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 “A**uto Number**” & Record Name- “Sales order Number” in “Enter Record Name Label and Format” Section.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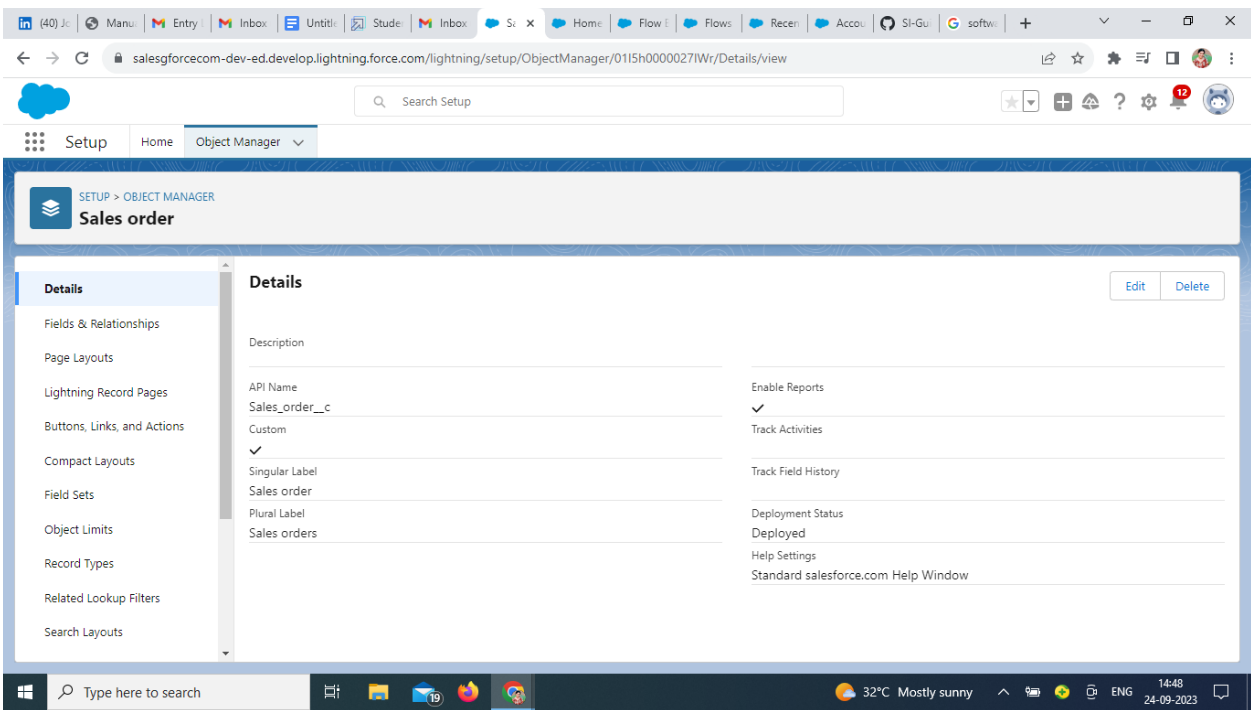
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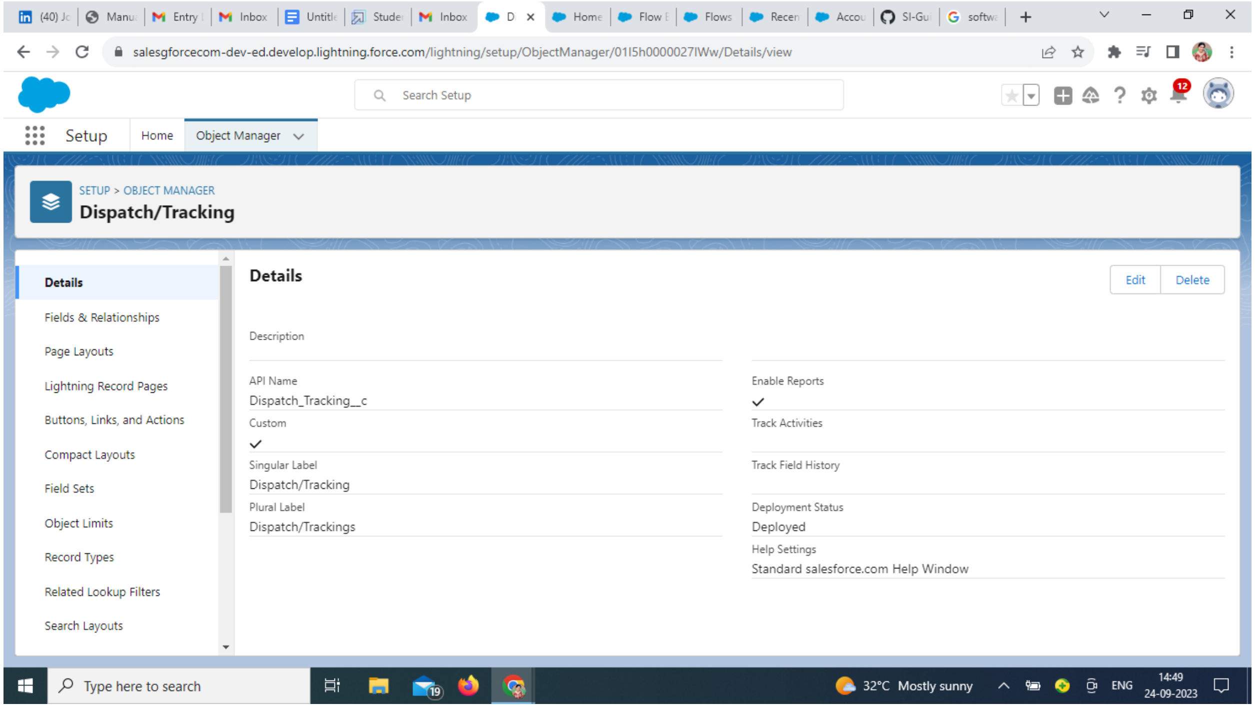
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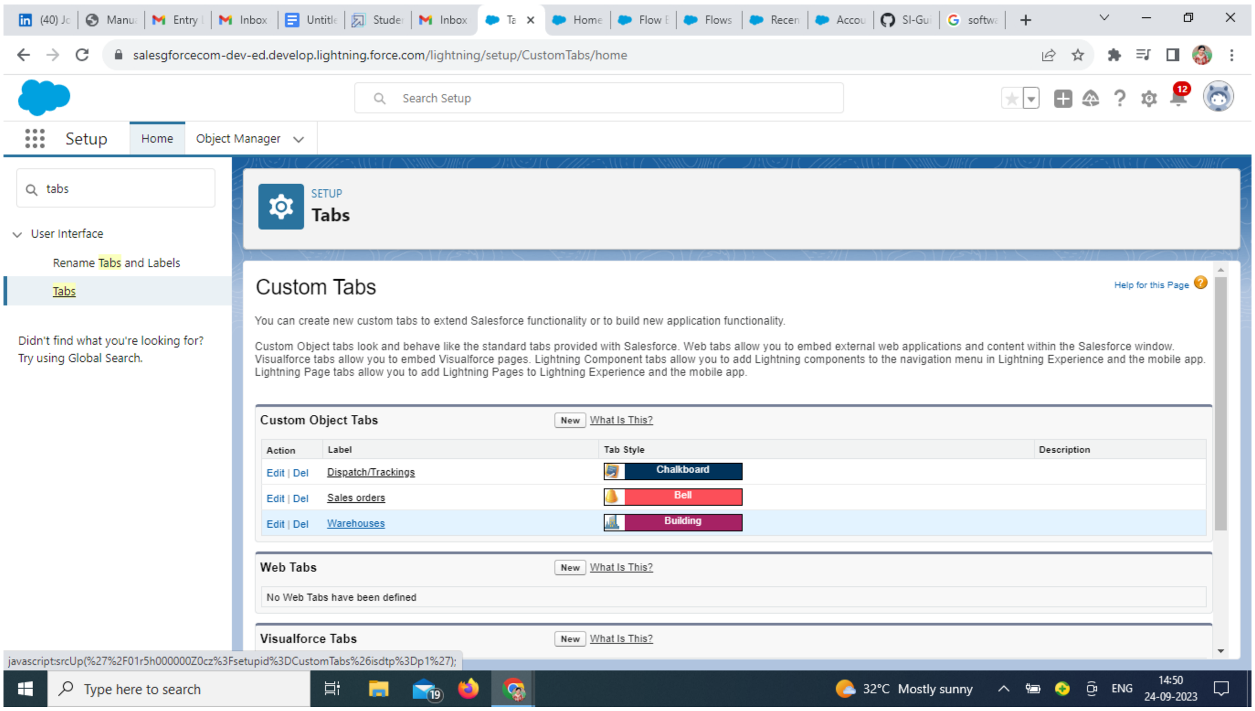
Create A Tab For Warehouse Object

Now create a custom tab. Click the Home tab.

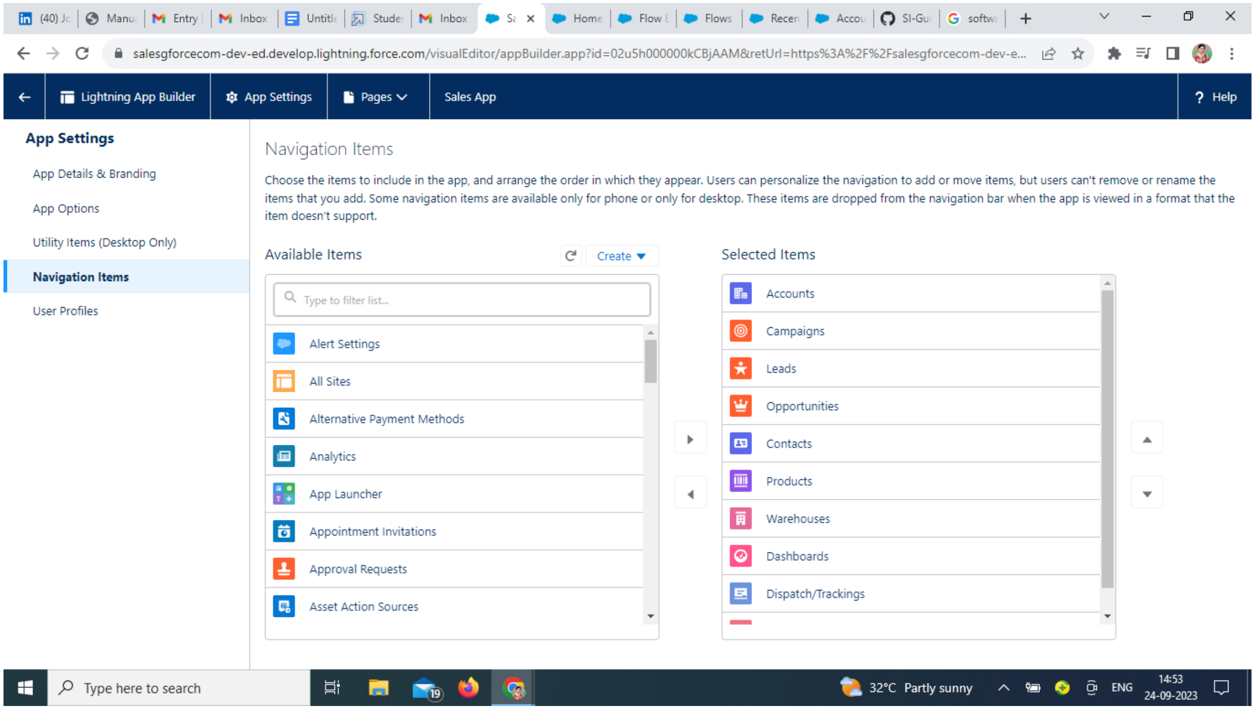
1. Enter Tabs in Quick Find and select Tabs.
2. Under Custom Object Tabs, click New.
3. For Object, select Warehouse.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save
6. In the same way create Tabs for all Custom Objects – Sales order, Dispatch /Tracking.

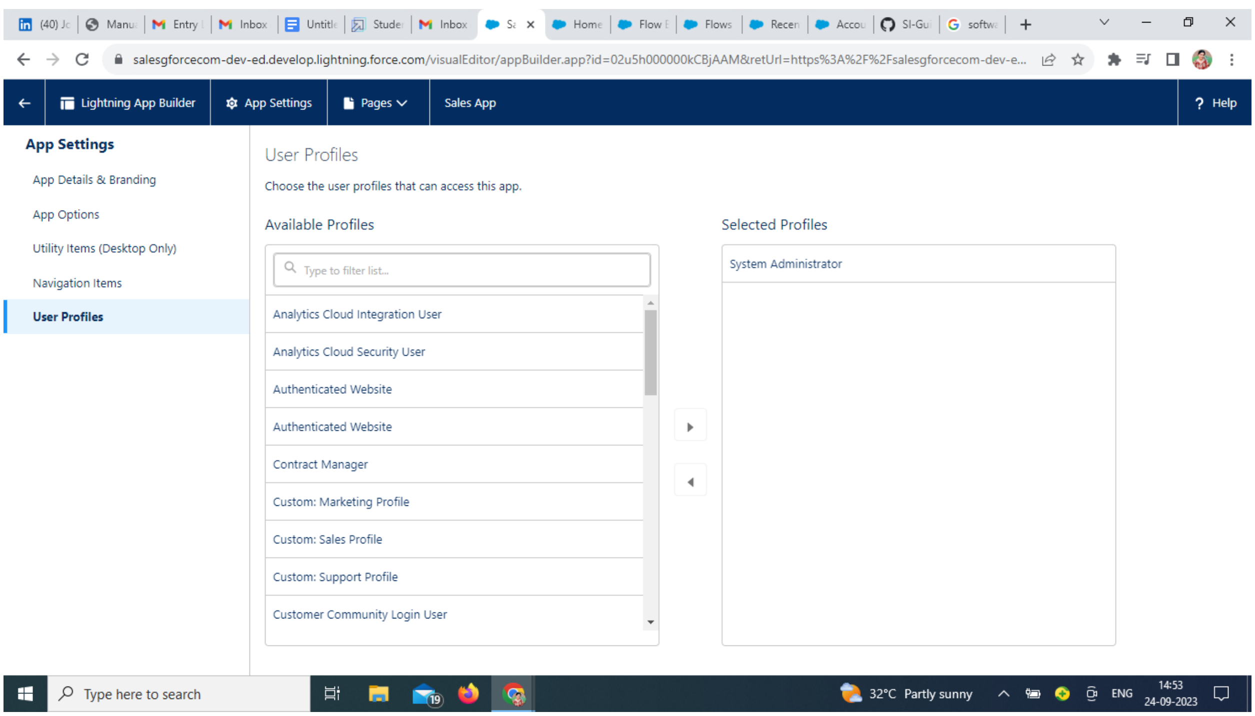


Create The Sales App

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.

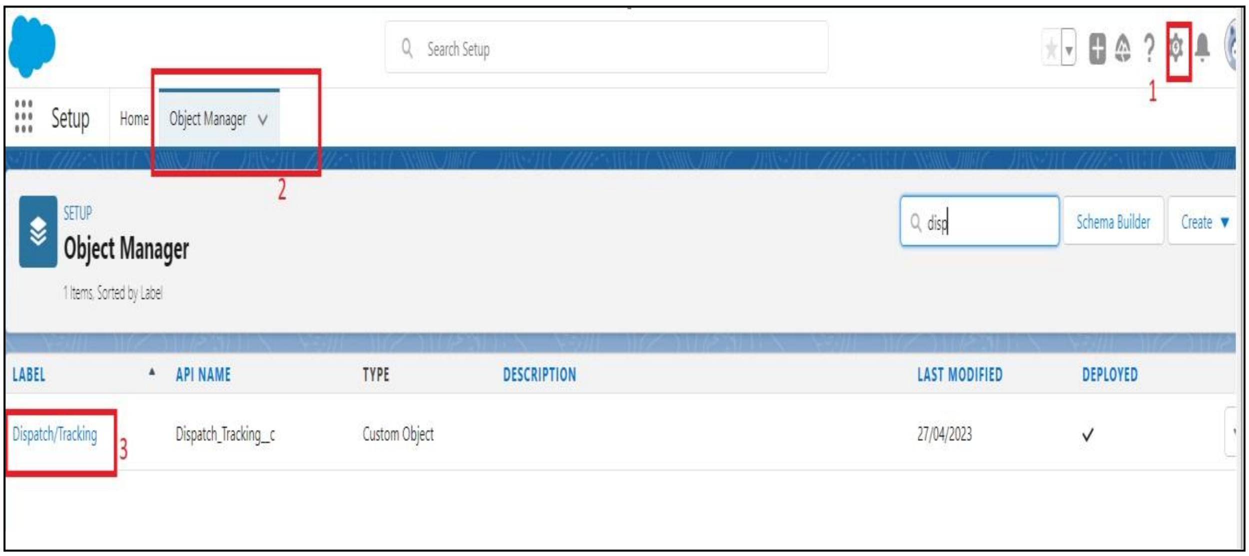
7. From Available Profiles, select System Administrator and move it to Selected Profiles.Click Save & Finish.

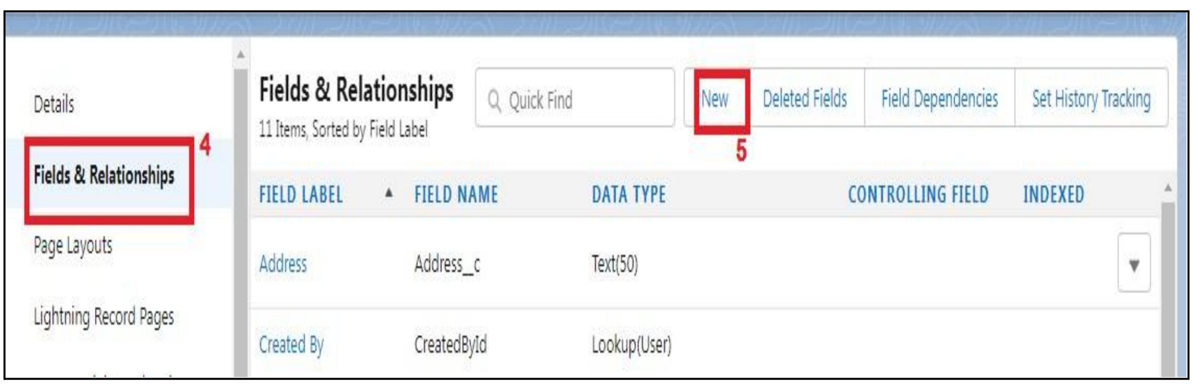


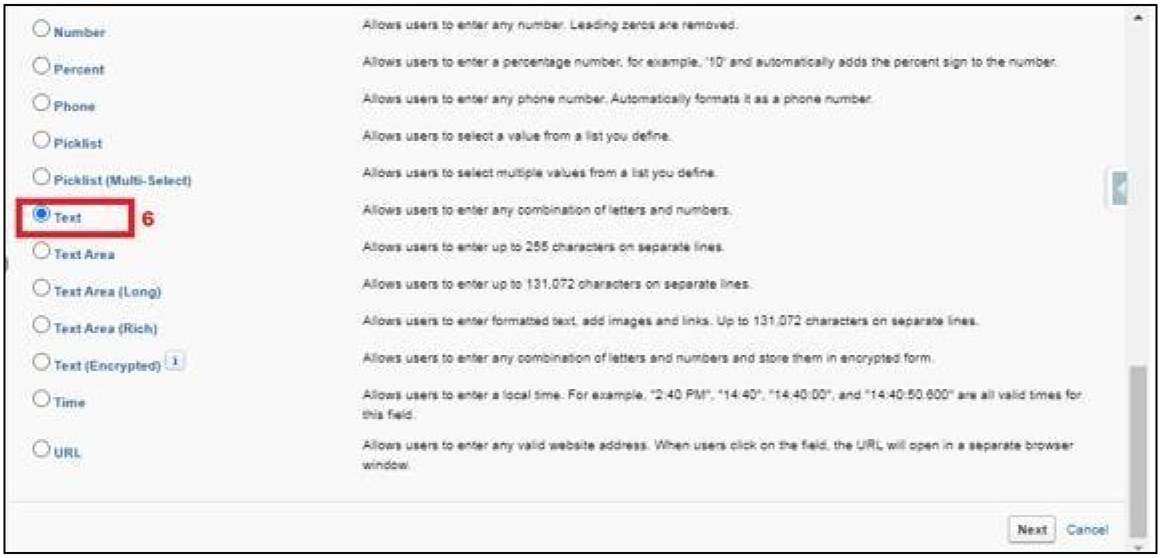


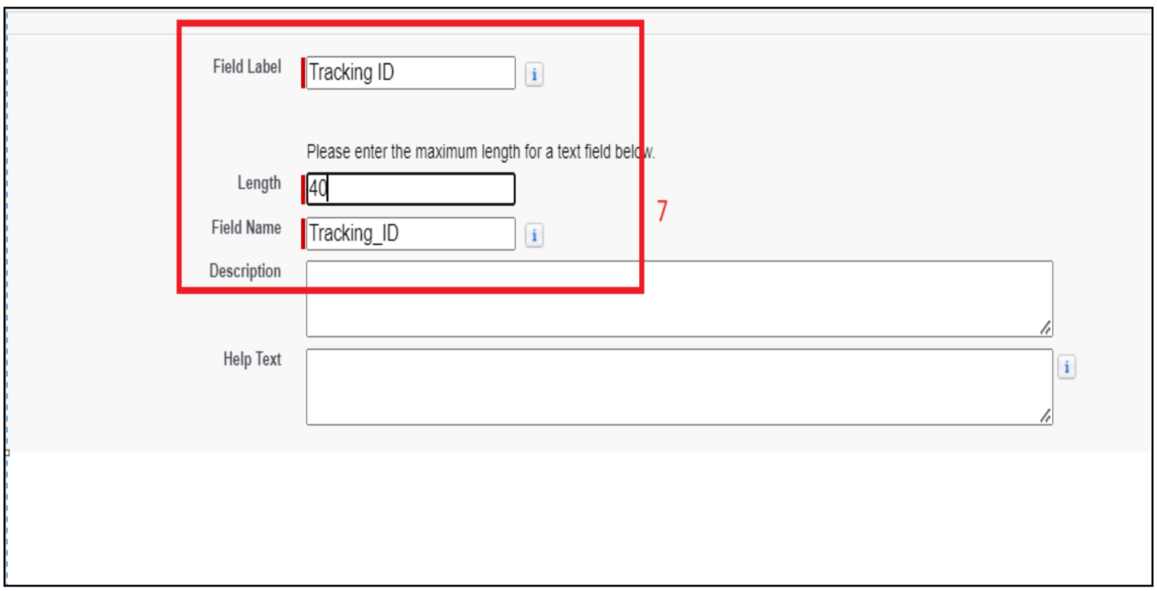
Creation Of Fields For The Dispatch/Tracking Object

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.









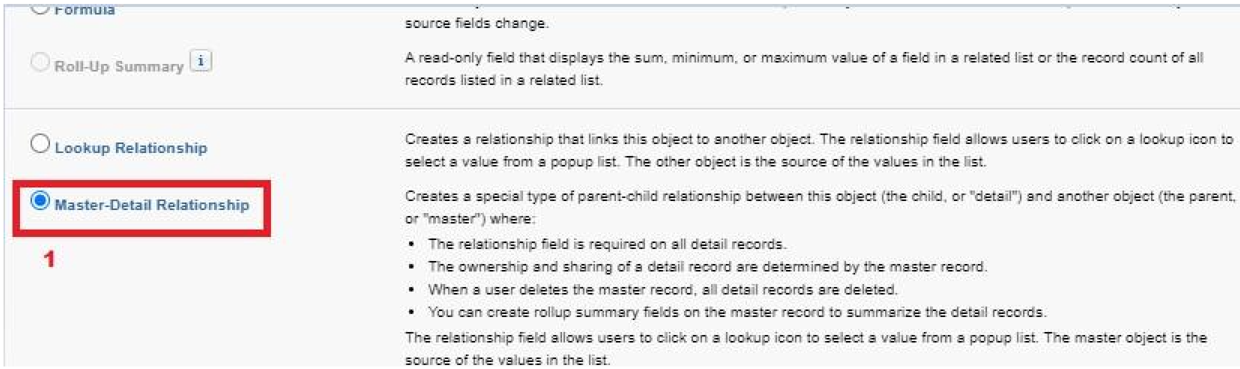
Now let's create the other fields and **we must choose the data types of the fields carefully**.

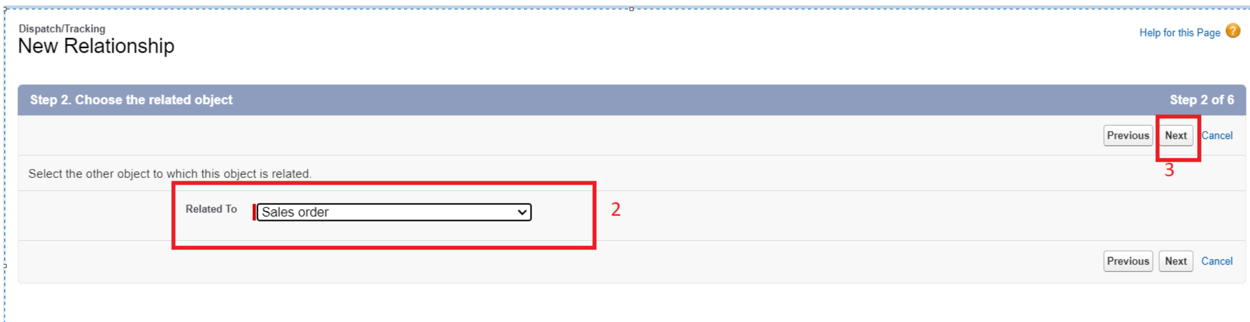
Create A Master-Detail Relationship On Dispatch/Delivery Object

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.

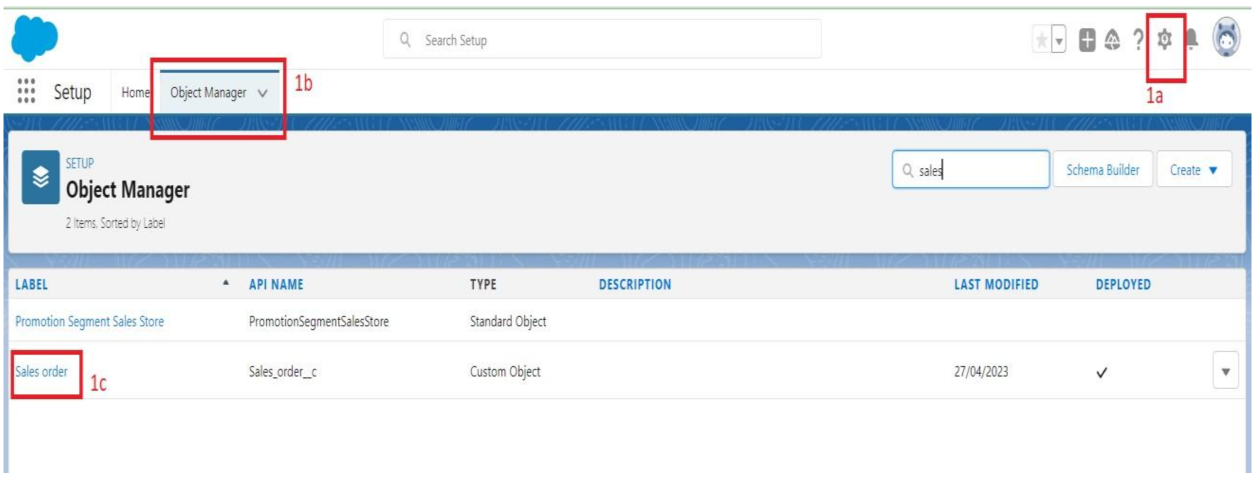
4. For Field Label, enter Sales order.
5. Click Next, Next, Next and Save.

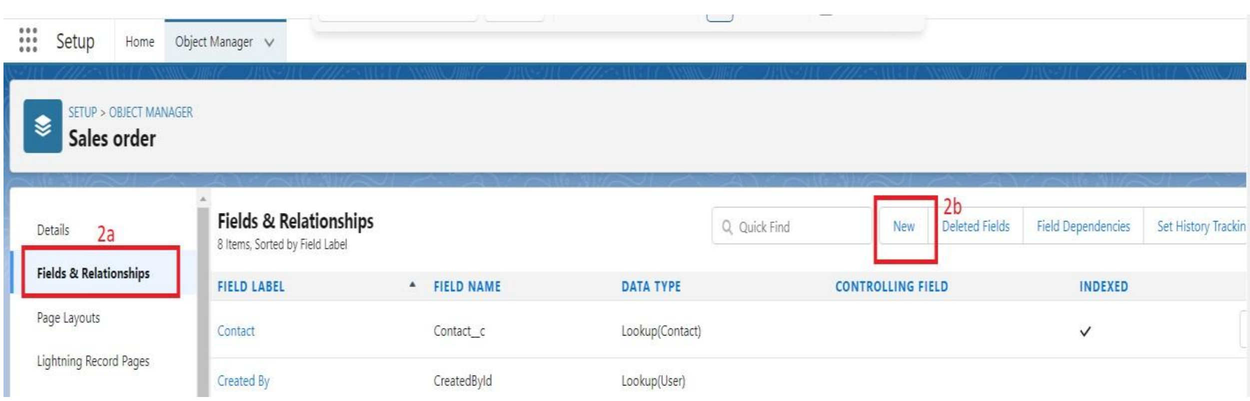


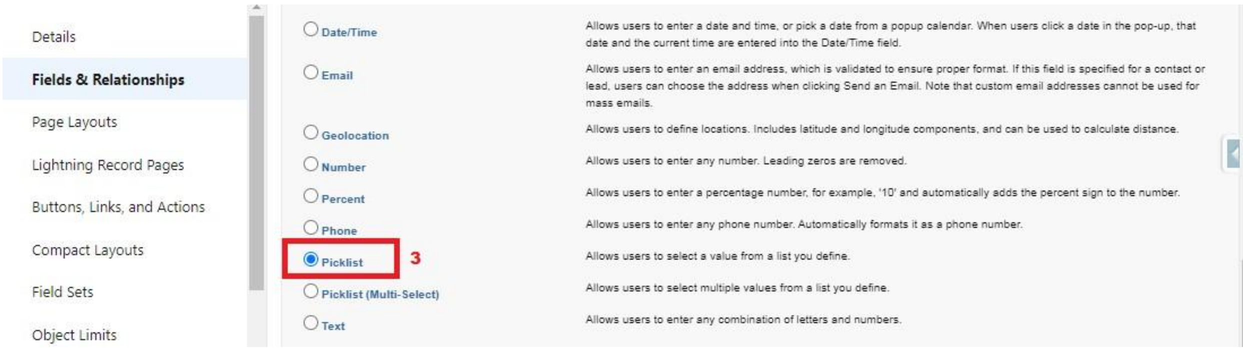


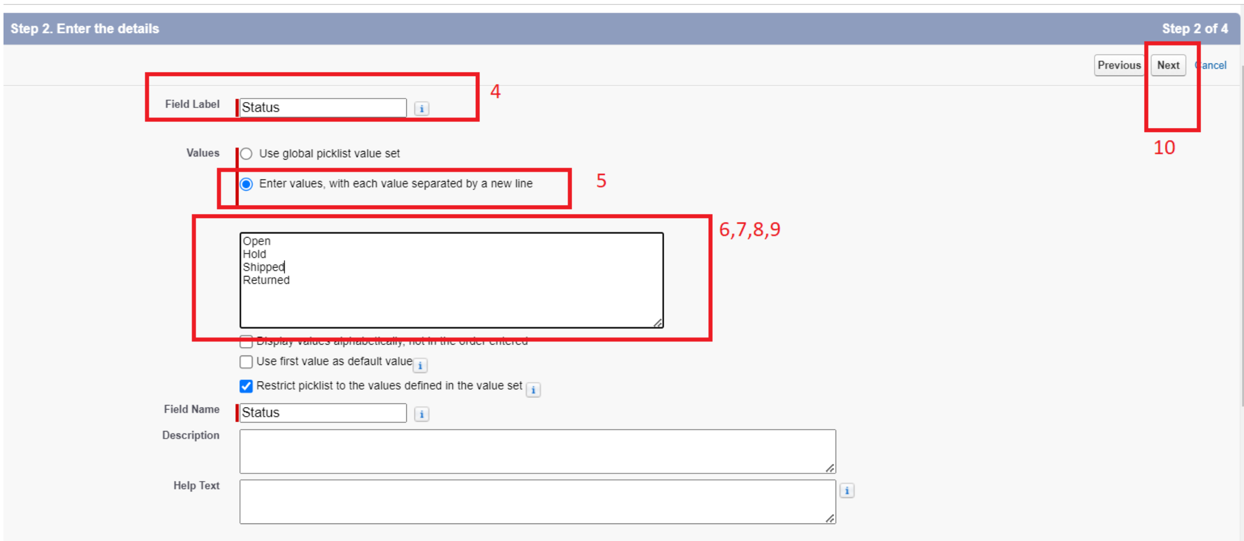
Create A Pick-List Field On Sales Order

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.



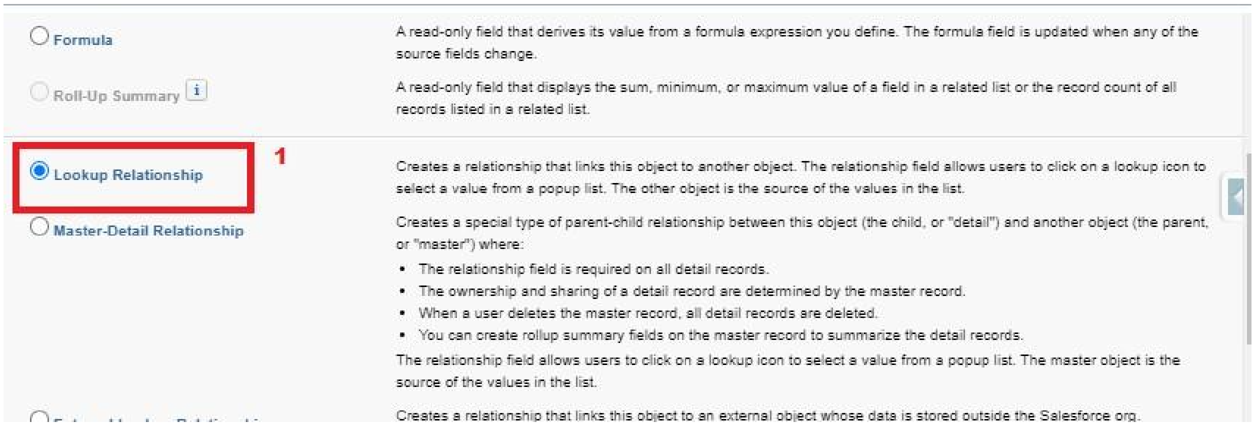


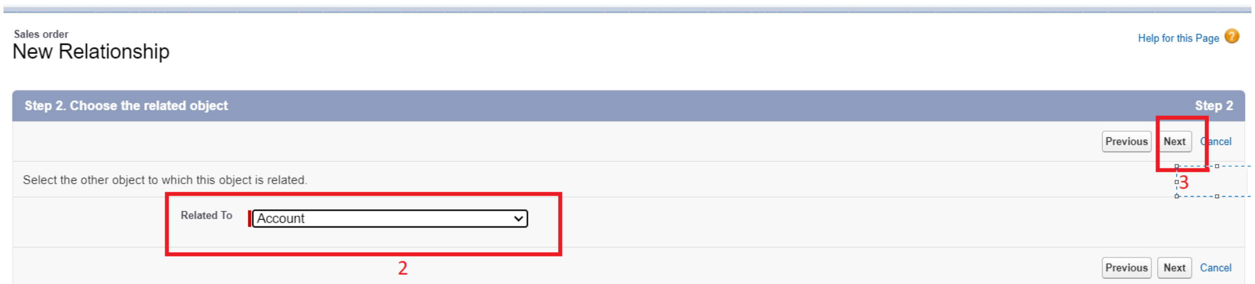


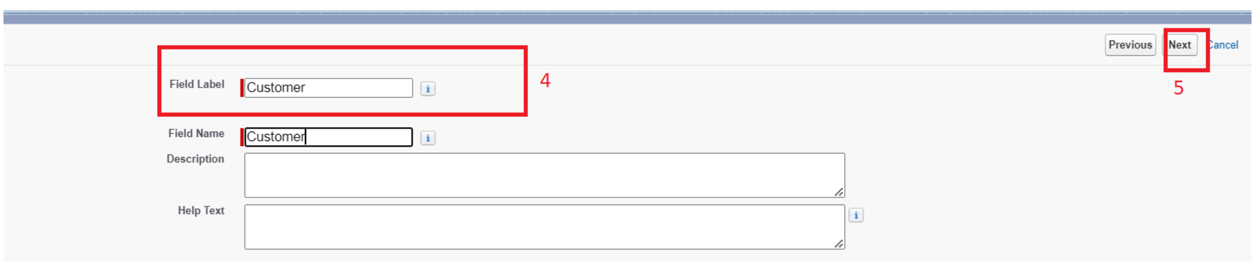


Create A Lookup Relationship On Sales Order Object With Account Object

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.



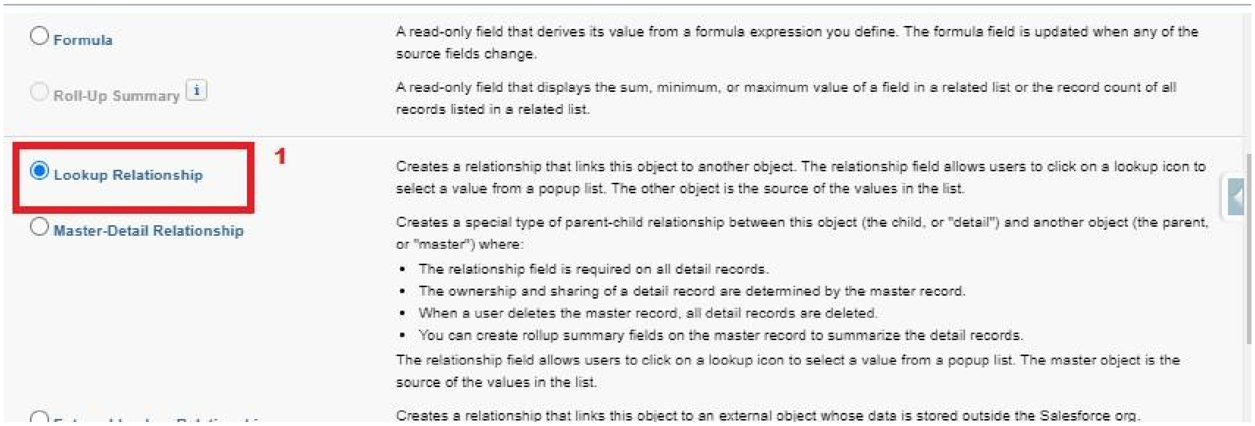


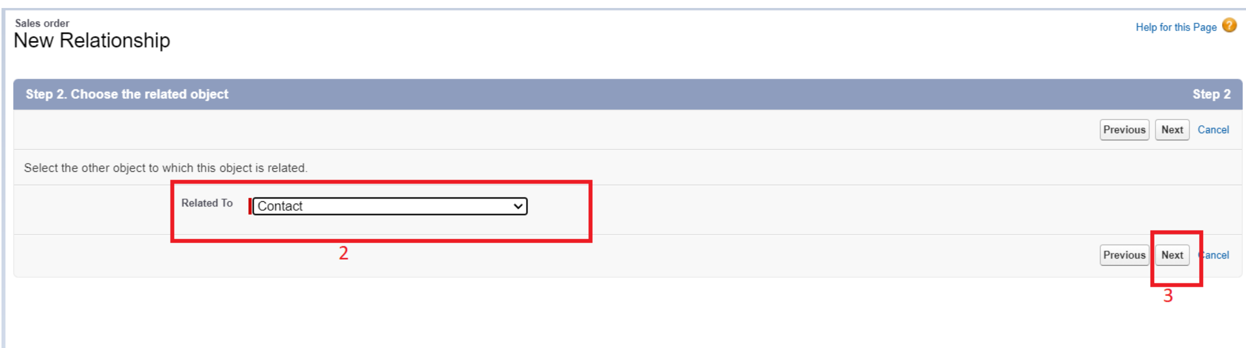


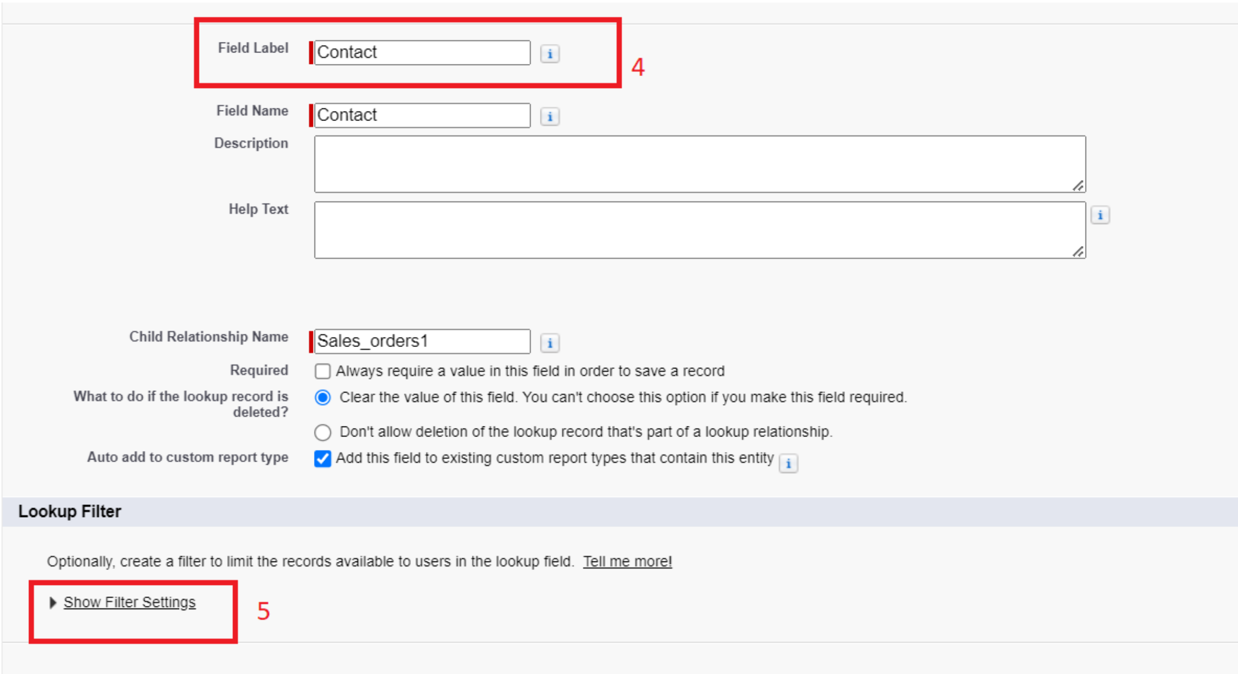
Create A Lookup Relationship On Sales Order Object With Contact Object With Use Of Lookup Filter.

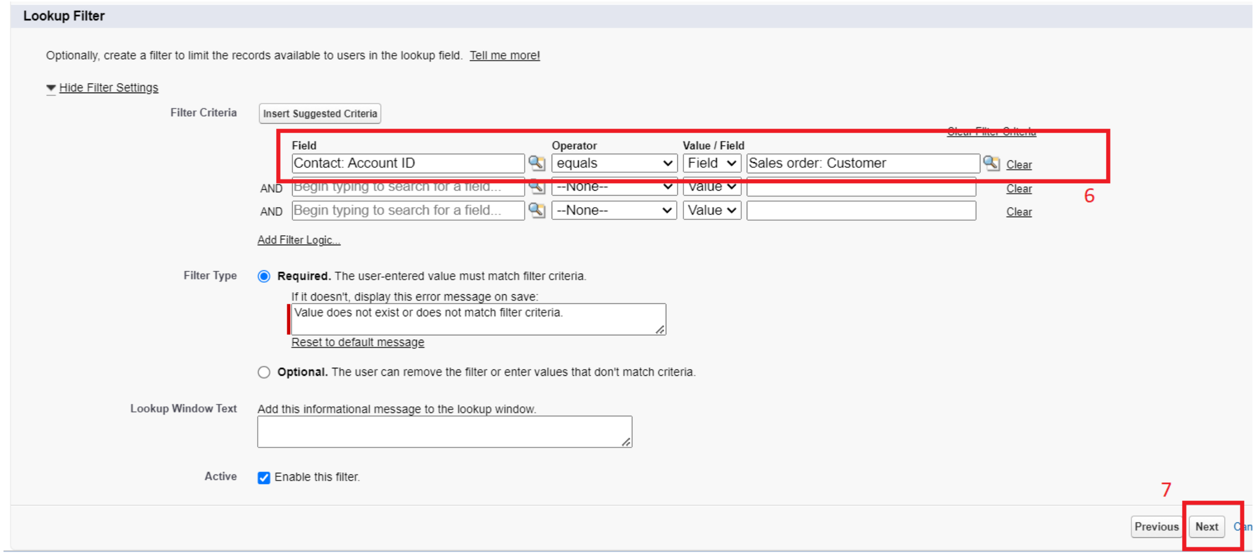
1. Select look up Relationship as the Data Type and click Next.
2. For Related to, enter **Contact**.
3. Click Next.
4. For Field Label, enter **Contact**.
5. Click **lookup filter**.
6. Provide filter as given below & also refer picture (Screenshot of Step 6)
   Contact: Account ID equals Sales Order: Customer

7. Click Next, Next, Next and Save.



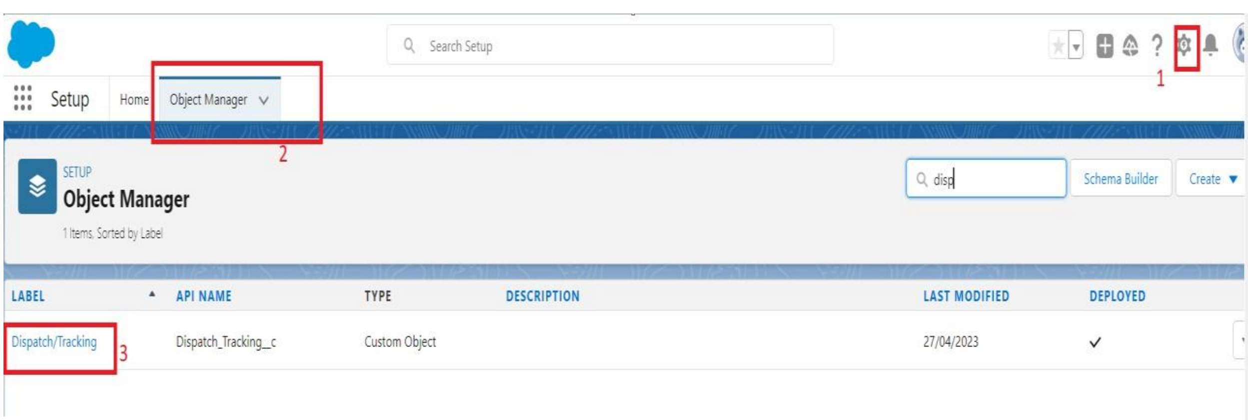


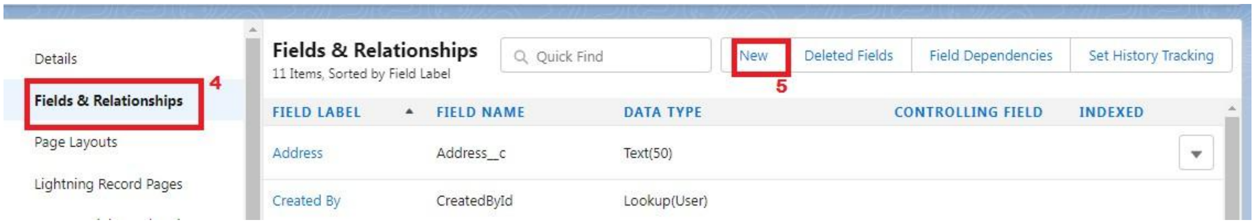

Field Label
Contact
4
Field Name
Contact
Description
Help Text
Child Relationship Name
Sales_orders1
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
Don't allow deletion of the lookup record that's part of a lookup relationship.
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!
Show Filter Settings
5

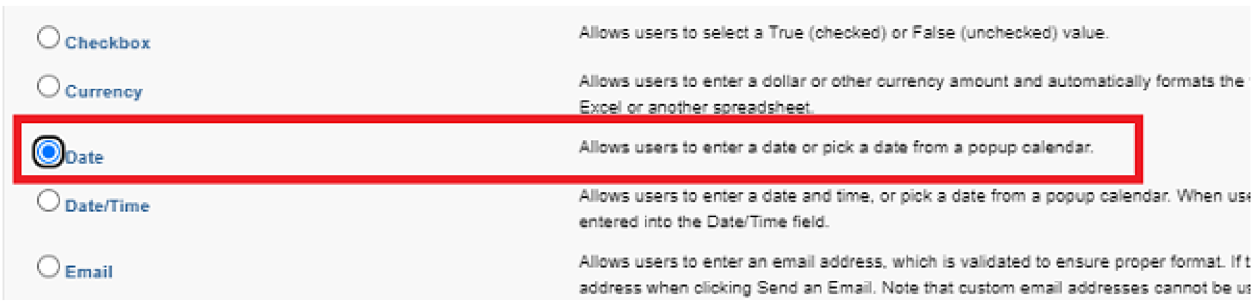


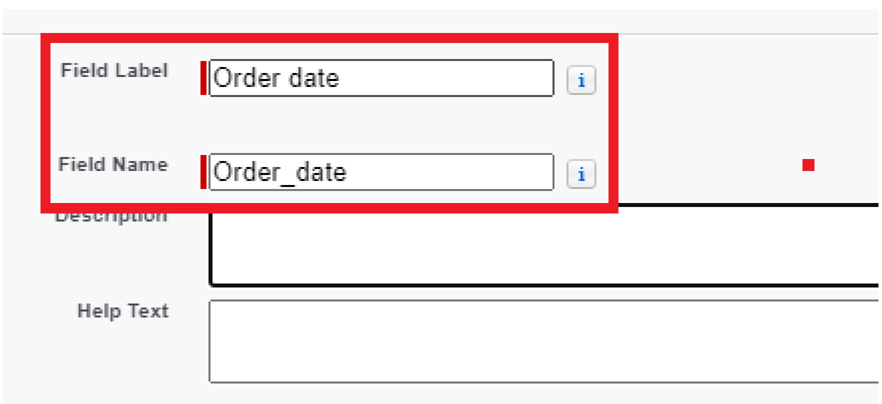
Create Order Date Field On Sales Order

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.









Cross-Object Formula Field

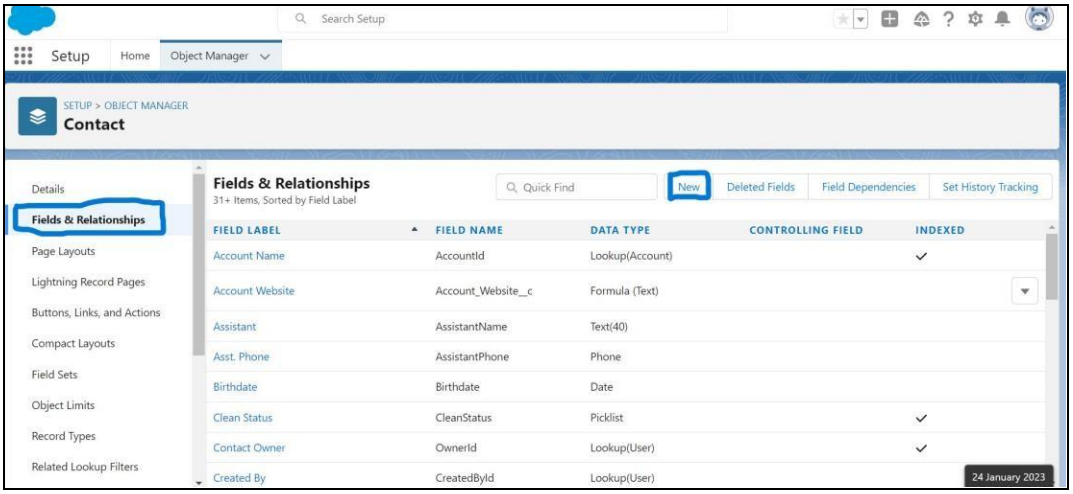
A cross-object formula field is basically a formula field.

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.

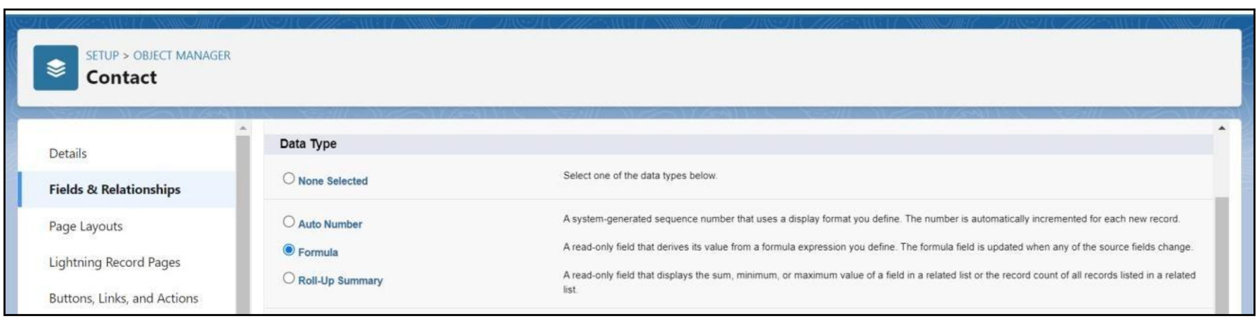
A cross-object formula works with Lookup relationships as well as in Master detail relationship. You can reference fields from objects that are up to 10 relationships away.

Creation of cross object formula field-

1. Select your object from object selection has Contact.
2. And select the option fields and relationships.

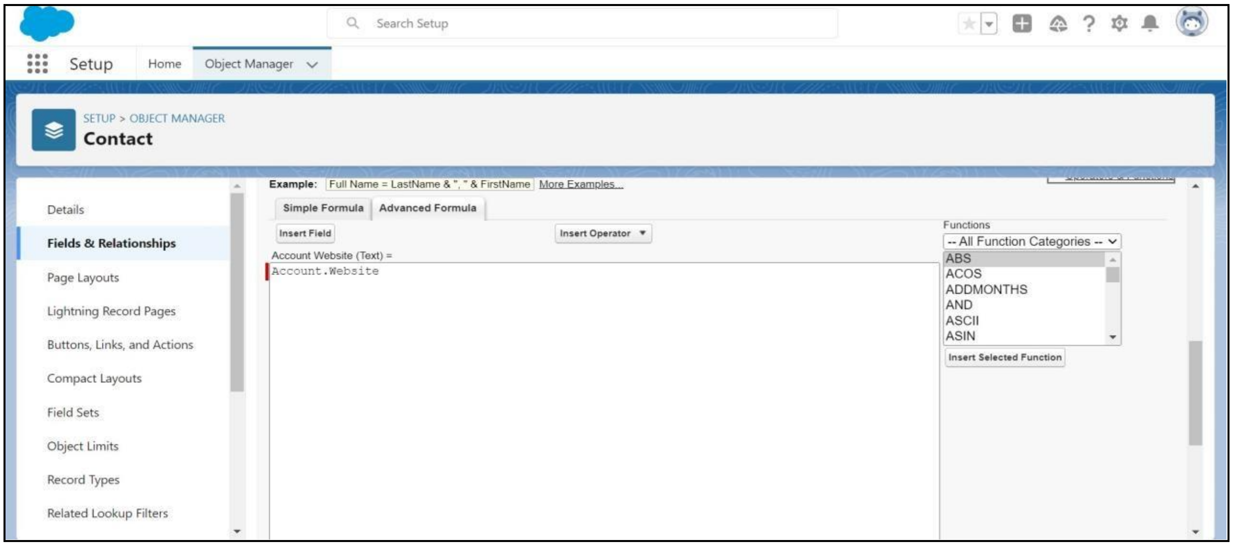


3. At the top right side you can find a new select that option.
4. Now you have to select data type as **formula**.



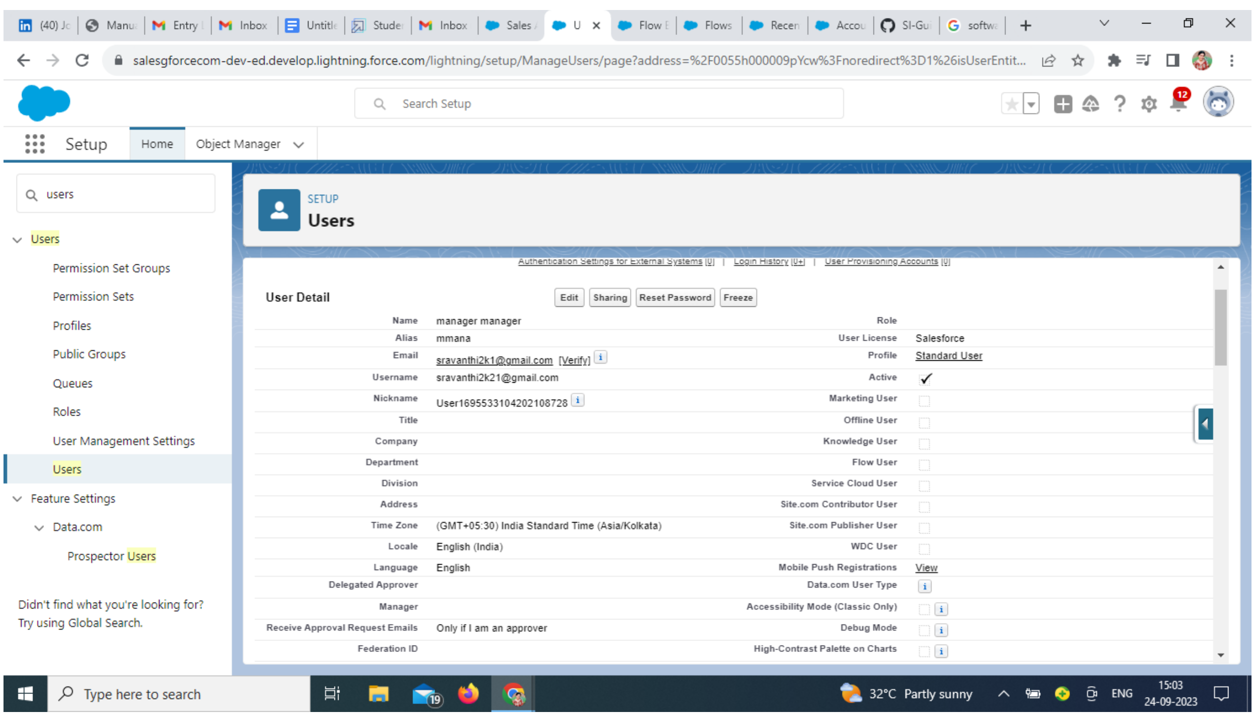
5. And you will navigate to enter the details page where you give the field label.
6. And give the label name has Account Website
7. Select formula return type **Text**

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.



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.

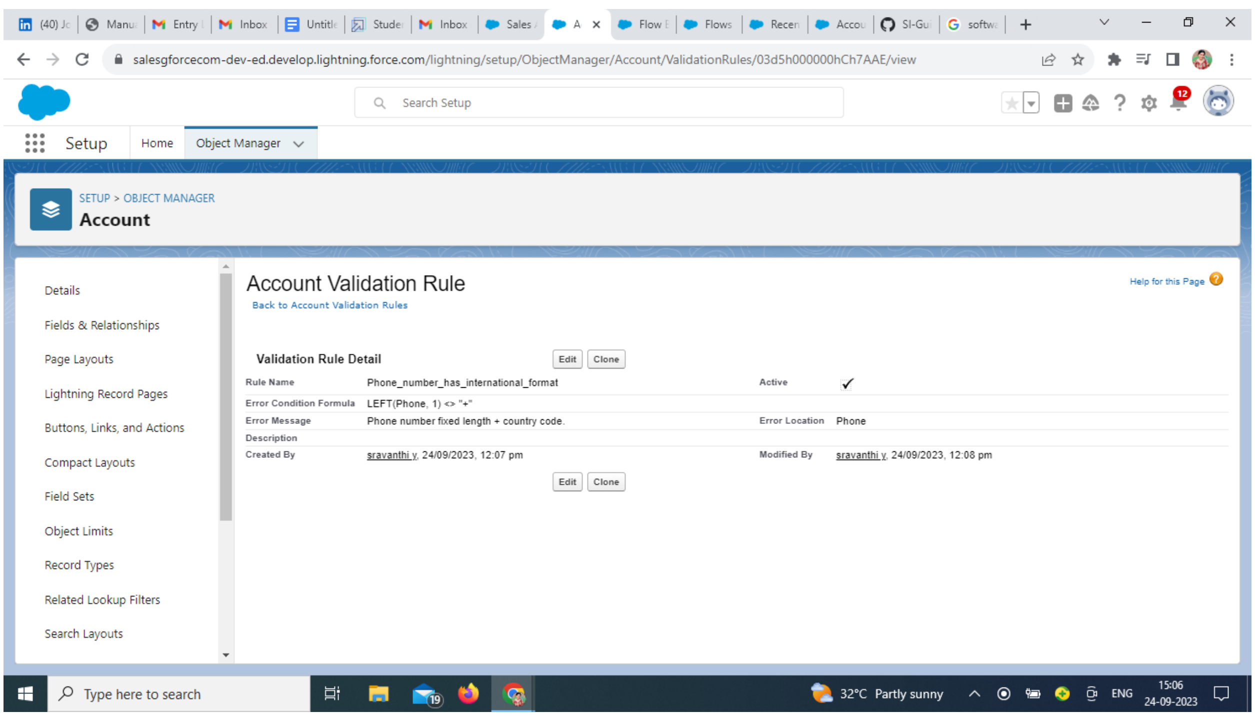
5.Select a User License as Salesforce

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) <> "+" .

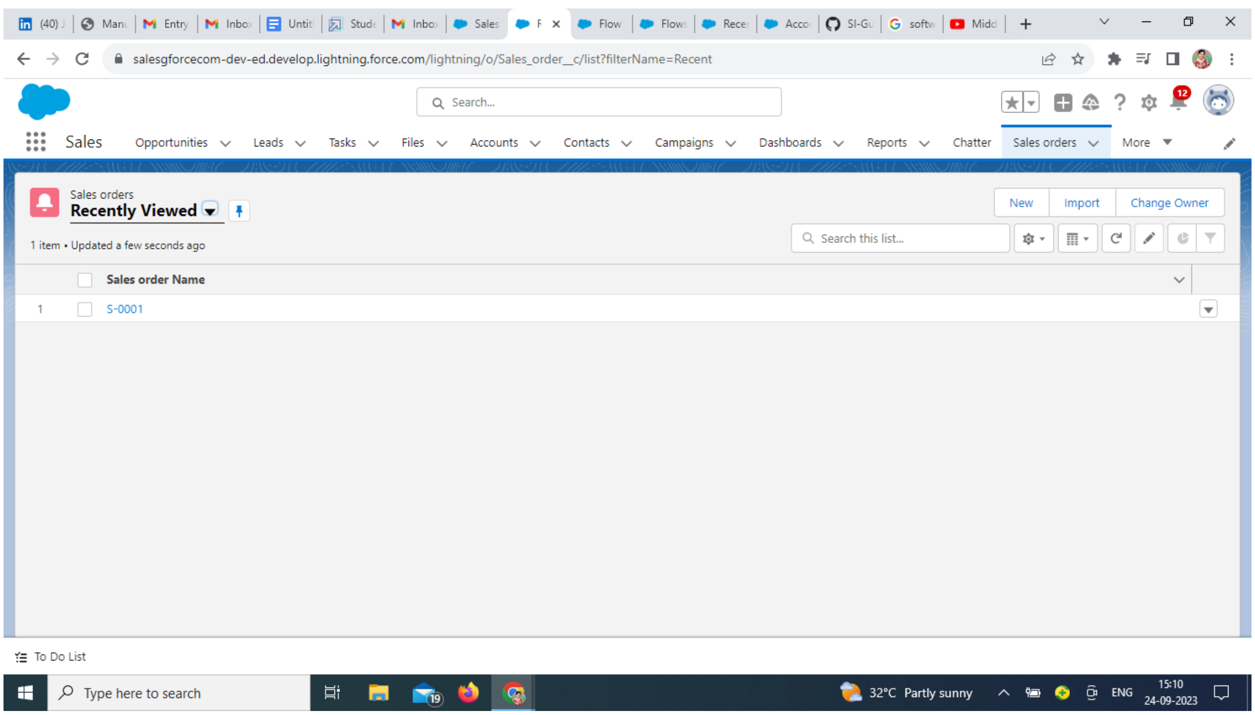
4.And in error message give the description has Phone number must begin with + (country code).

5.In error location select field.

6.Save

Create Record (Sales Order)

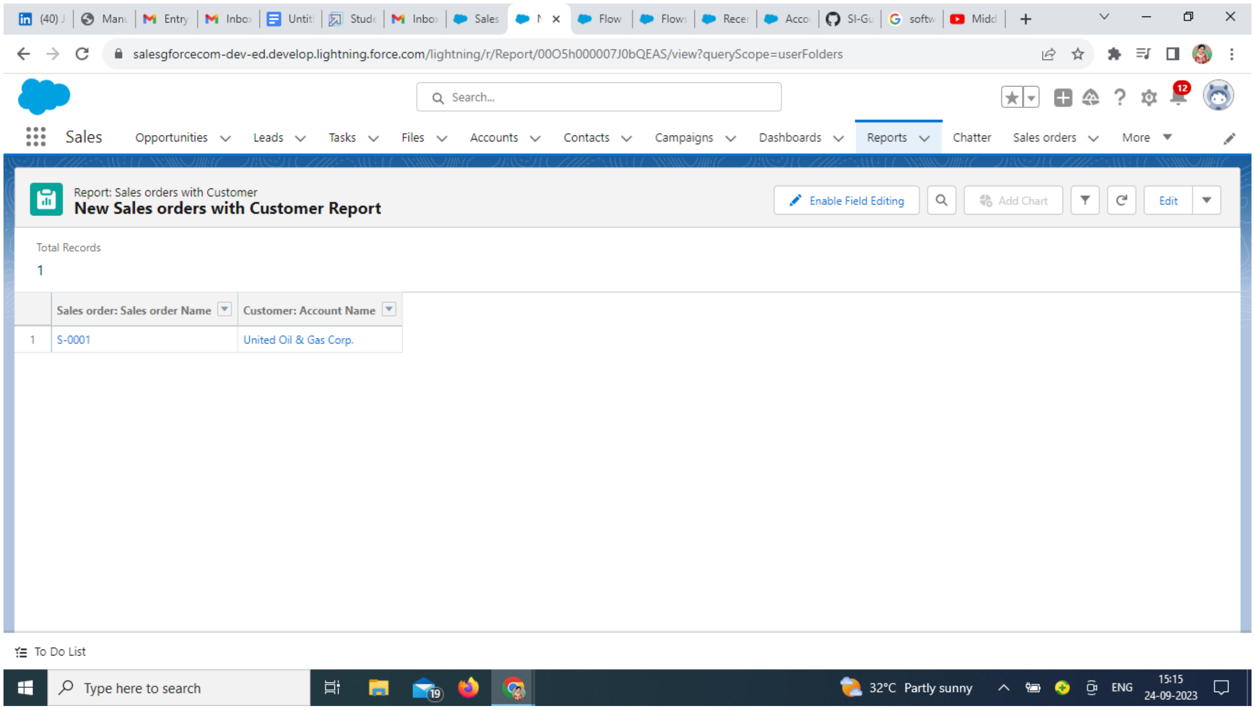
1. Click on App Launcher on left side of screen.
2. Search Sales App & click on it.
3. Click on Sales Order tab.
4. Click new button



Create Report

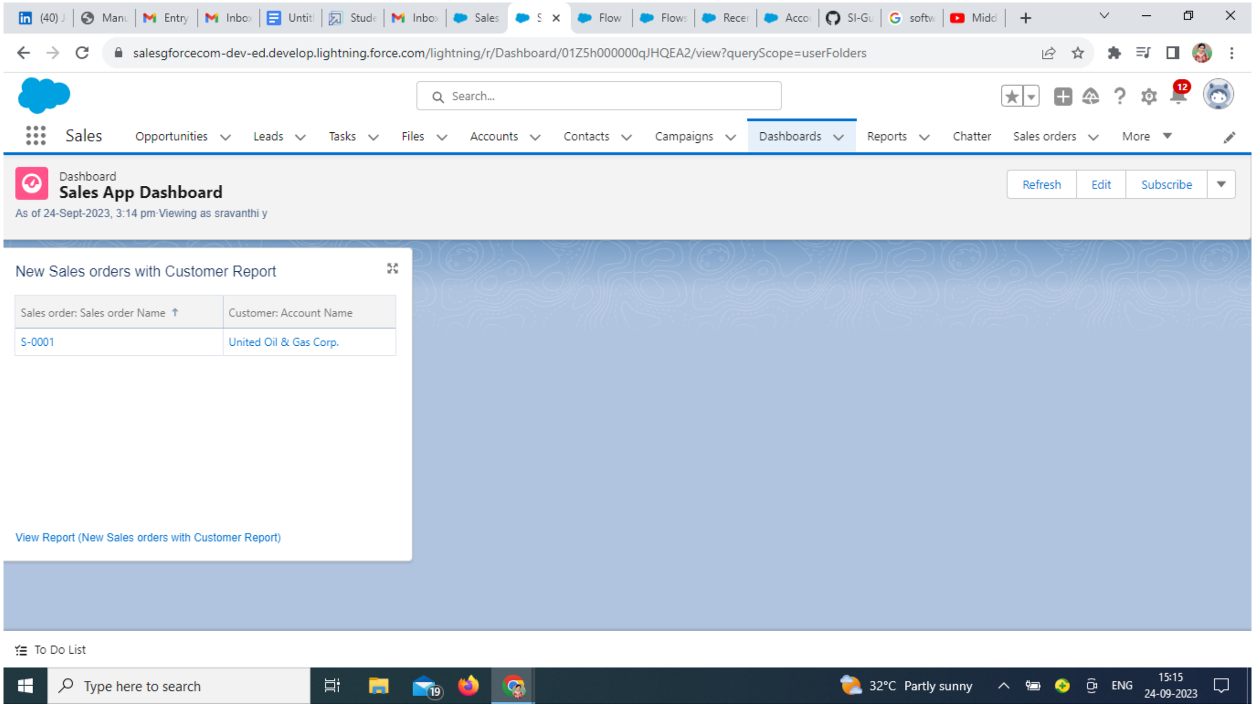
1. Click App Launcher and

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



Create Dashboard

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

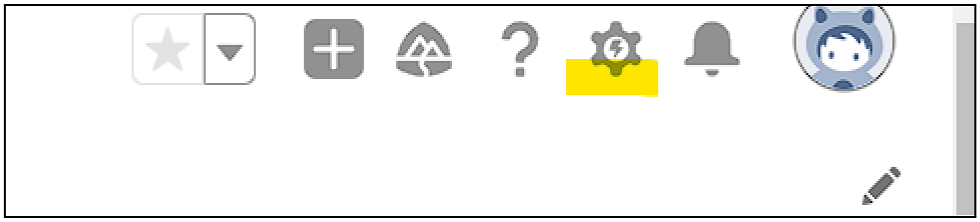


Flows

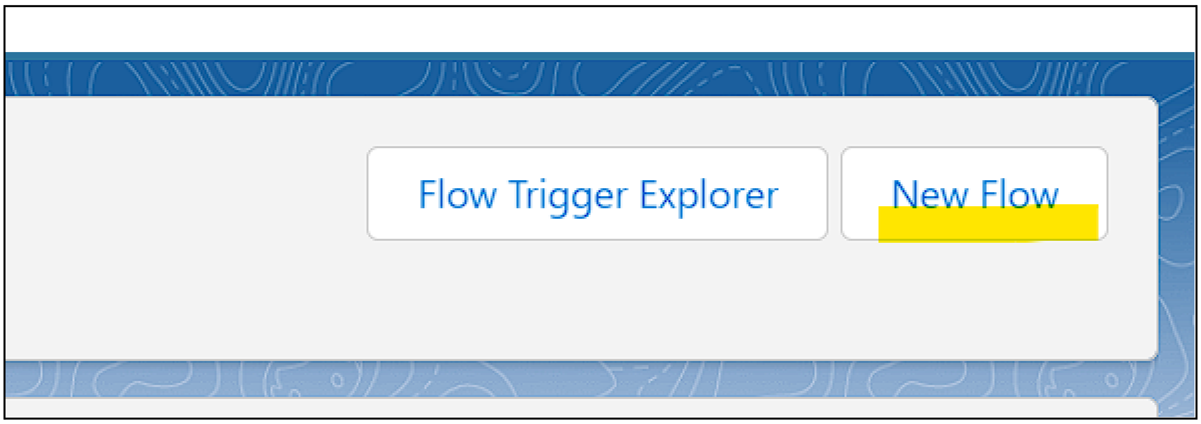
Flows are an automation tool provided by Salesforce which can be used to perform various tasks like, Sending an Email, Posting a chatter, Sending custom Notifications &, etc. Flow is the most powerful automation tool provided by Salesforce. It can be trigger for record insert, update and record delete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

Create Flow

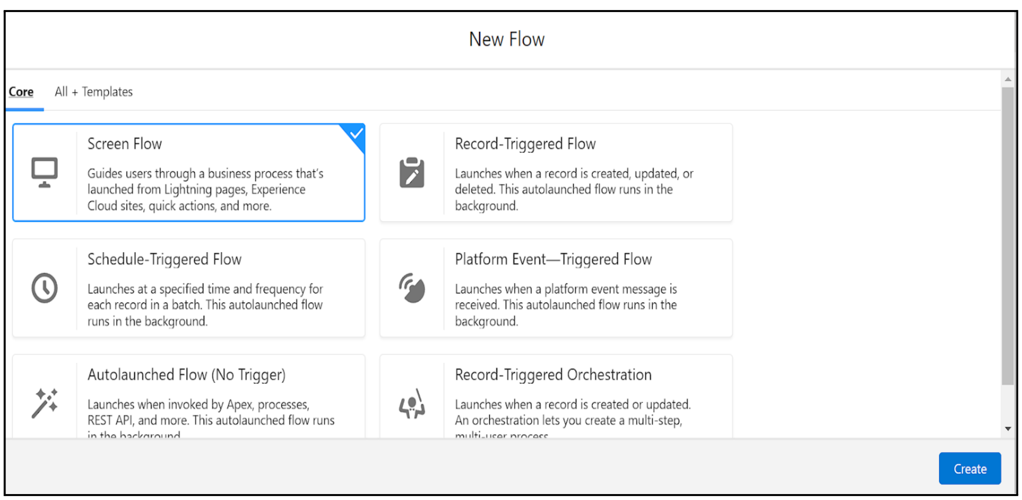
- Click on setup gear



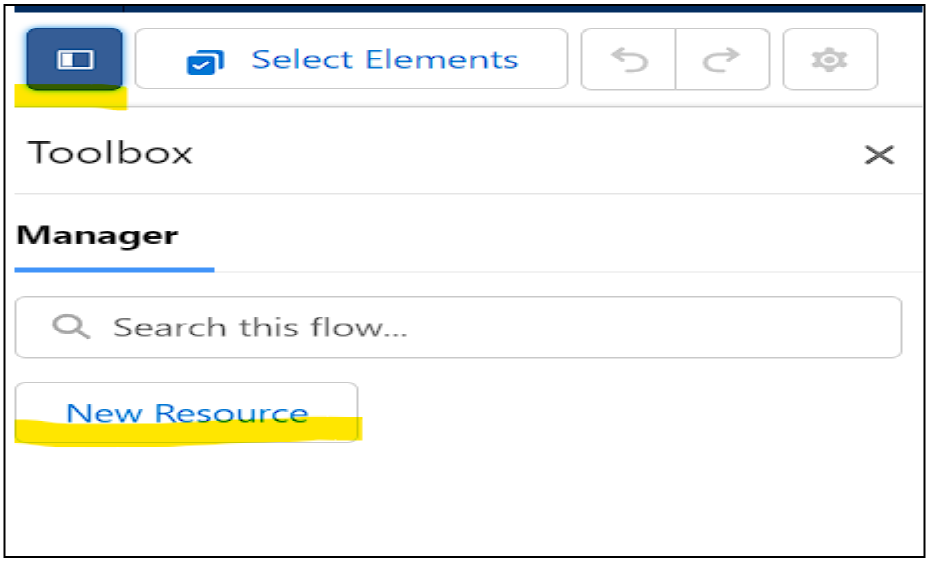
- In quick find search for Flows
- Choose new flow option at right side of the page



- Now select screen flow as a new flow



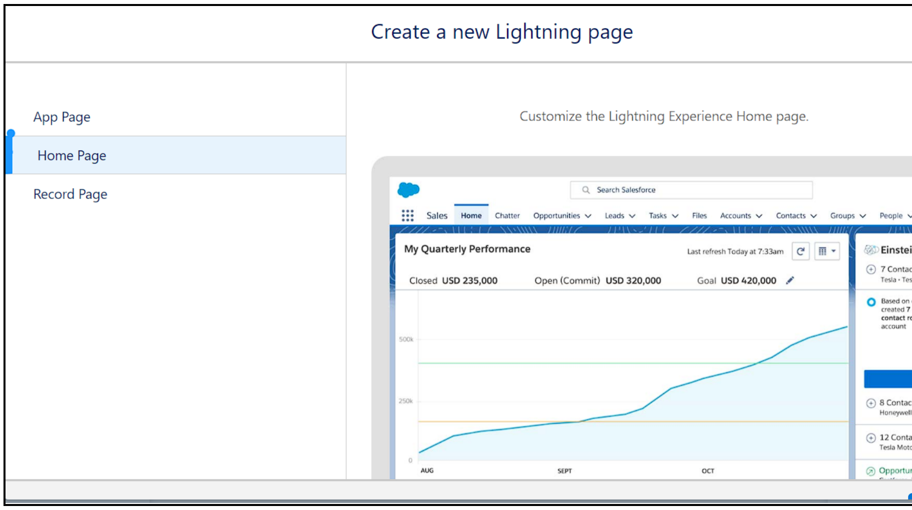
1. Left side corner of the page you can find a toggle click on that and select a new resource.



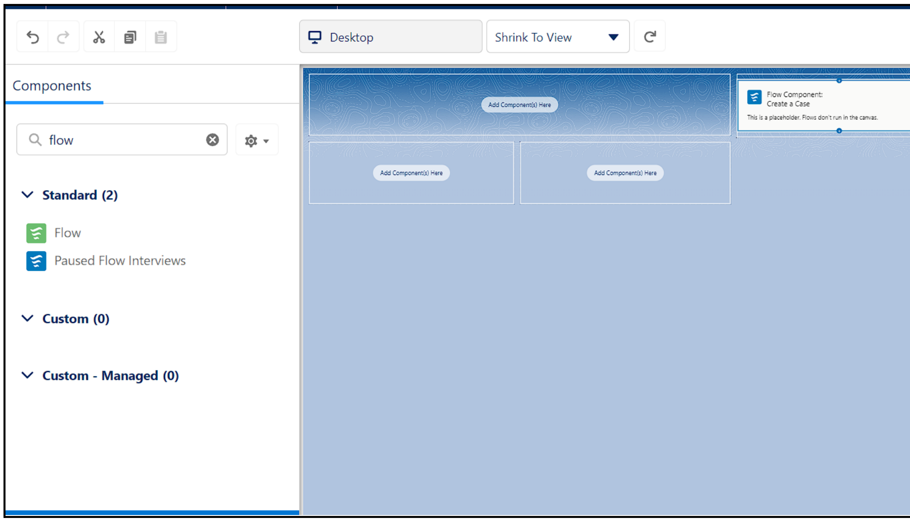
2. and select resource type has variable
3. Give api name as Recordid
4. and select data type as Text
5. At bottom for Availability outside the flow check the box as Available for Input
6. Click on done

To Create Lightning Home Page

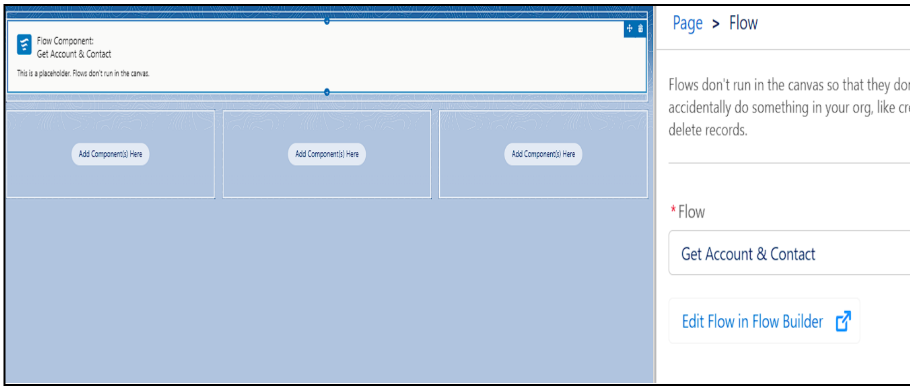
1. Click on setup gear.
2. Now search for lightning App builder.
3. And select New option
4. In create a new lightning page select Home page.



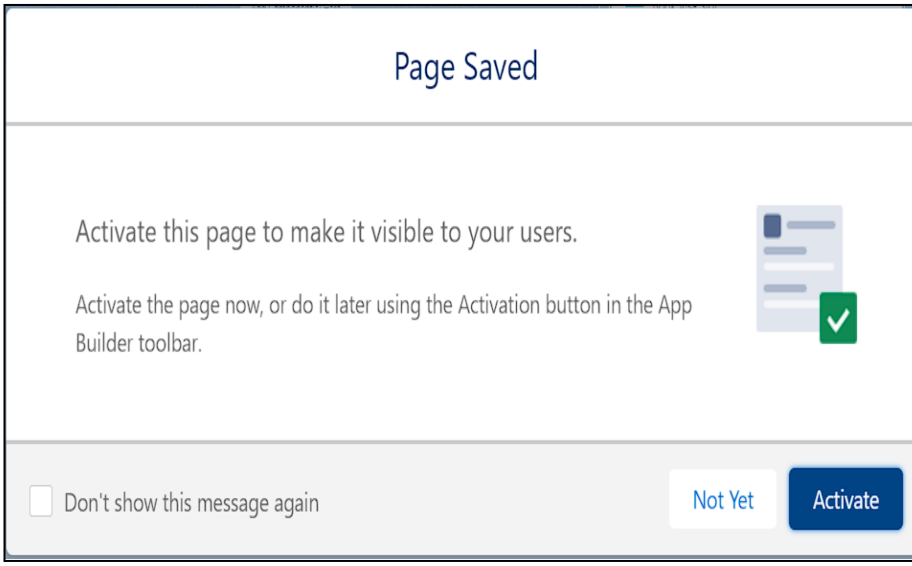
5. Select Next
6. Give the label name - Account & Contact
7. Choose a standard home page.
8. Now in the component section select flow and drag down it to Corner of the page.



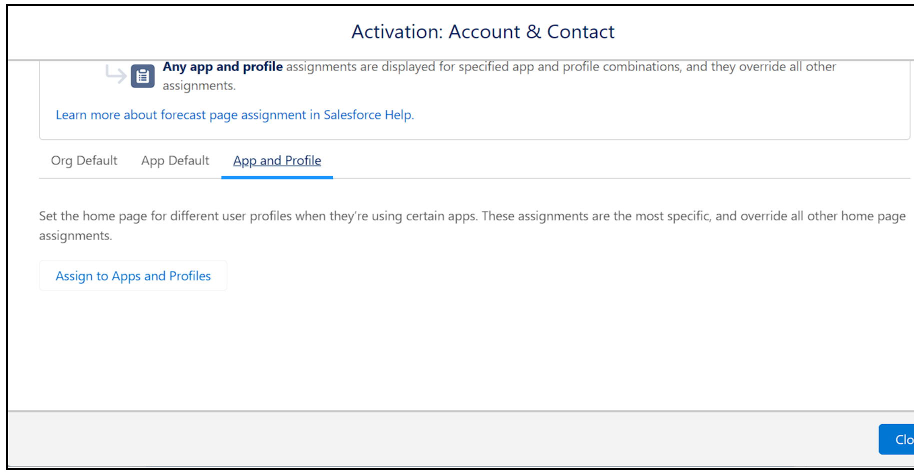
9. At the right side select the flow Get Account & Contact



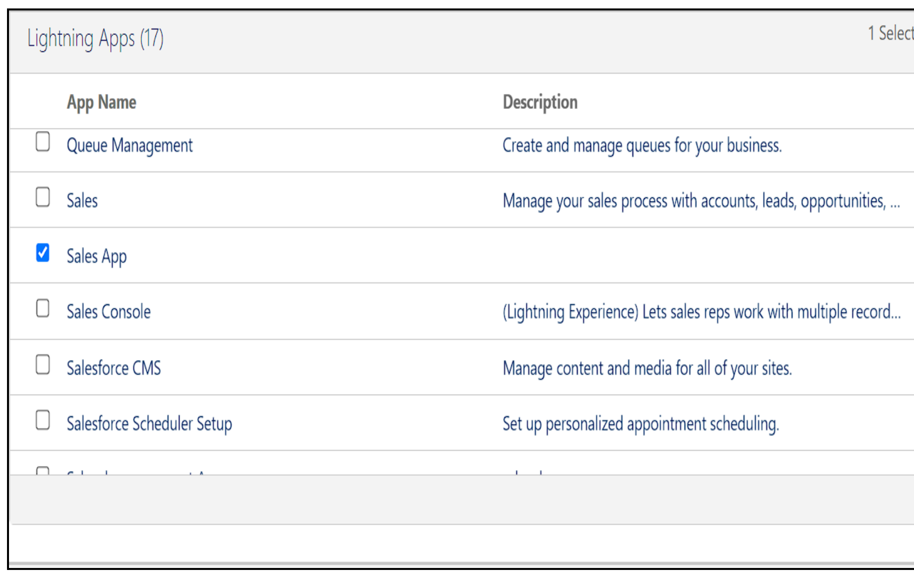
10. at the right side top of the page click on Save.
11. You will get the populate notification and click on activate.



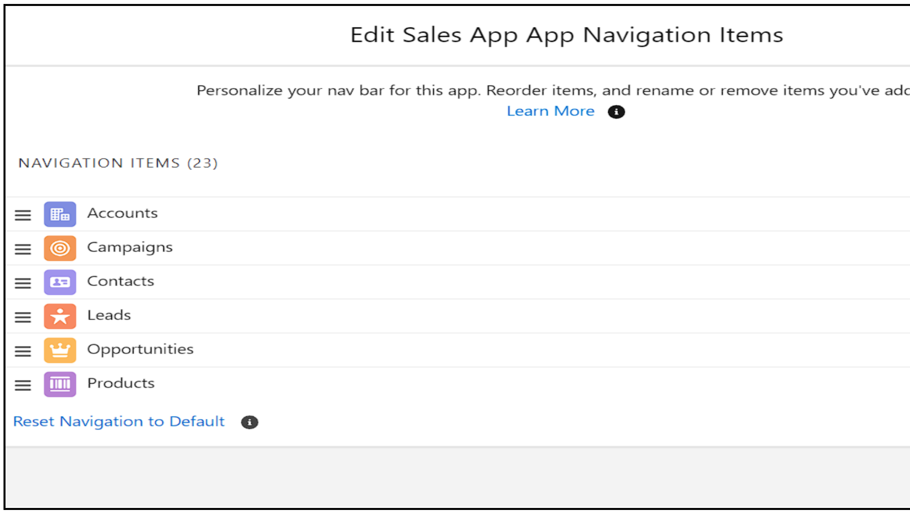
12. you will get an activation pop up select App and profile.

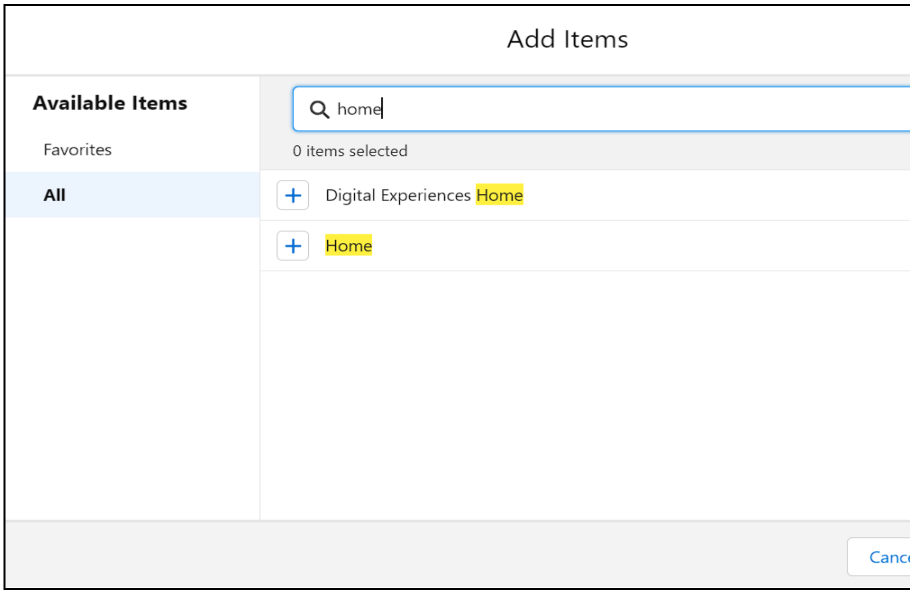


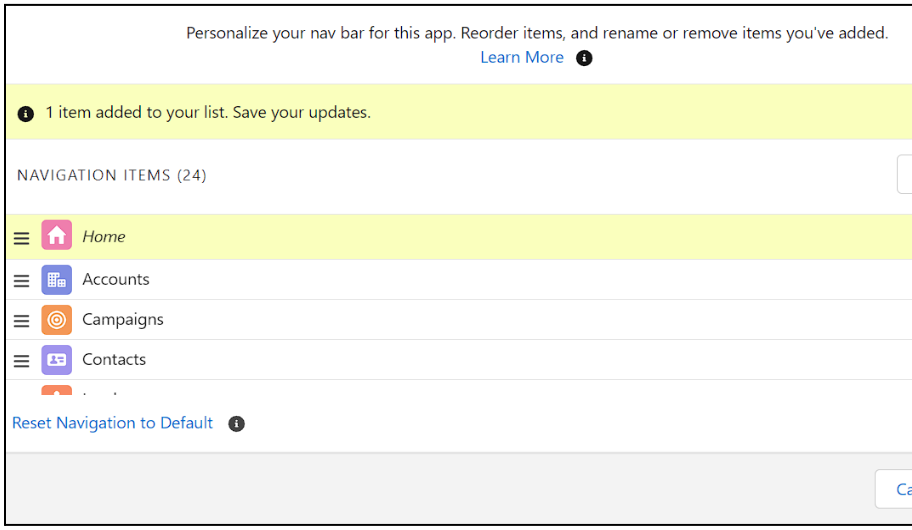
13. Select Sales app in lightning app selection.
14. In profiles select System administrator, Standard user, Standard platform user.
15. Save it.



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





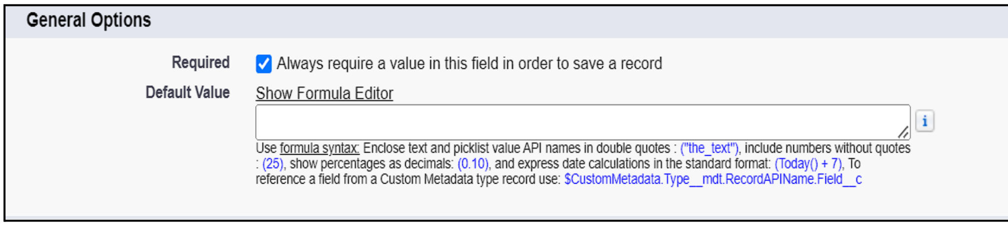


To Send An Email Alert To The Customer Once Order Is Confirmed

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.



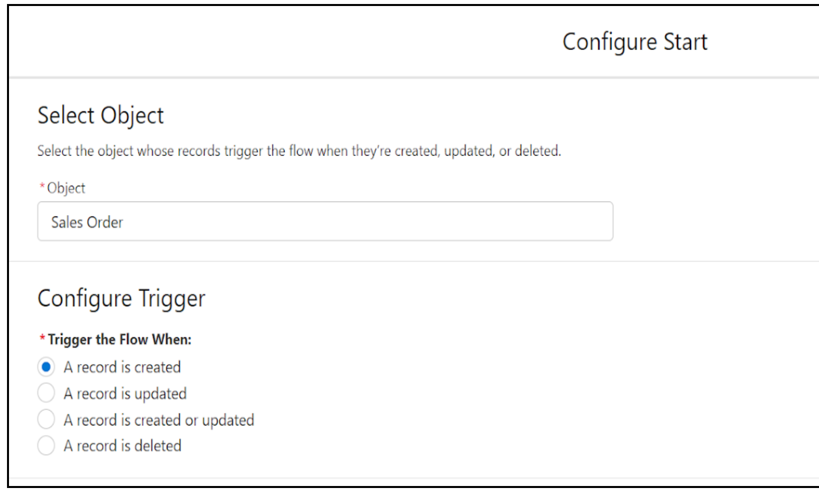
Now Create a new field Order confirmed

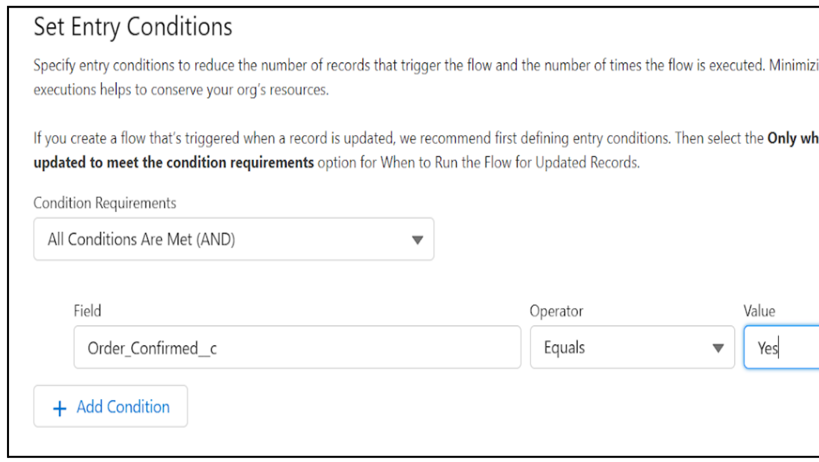
1. On the same object sales order create a Pikclist field.
2. Give the label name as Order confirmed.
3. And in Values give 1) Yes
   2) No
4. Make it as Required field.

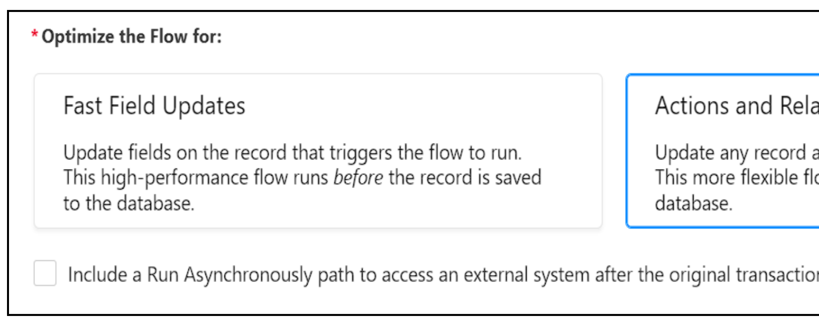
To Create Record Trigger Flow

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

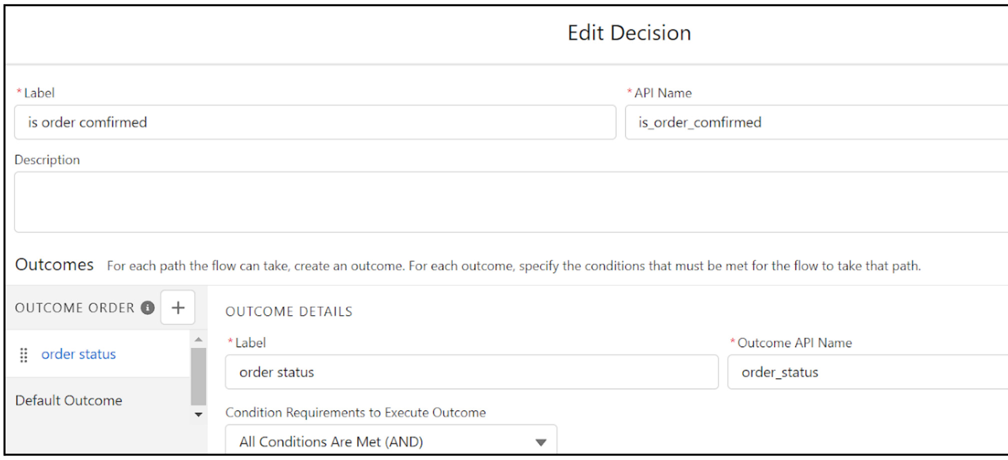


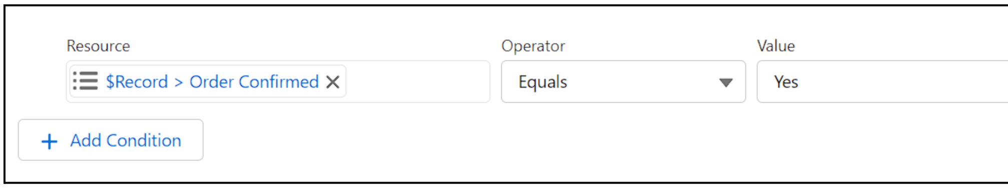




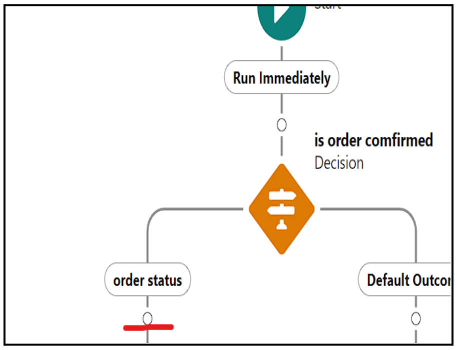
11. Now click on add element and in Logic section select Decision element
12. Give the element name as Is Order confirmed
13. In Outcome Details Label as Order Status
14. In condition requirement All Conditions are Met
15. In resource select $Record than field as Order confirmed
16. Operator - Equals

17. Value as Yes
18. Click on done

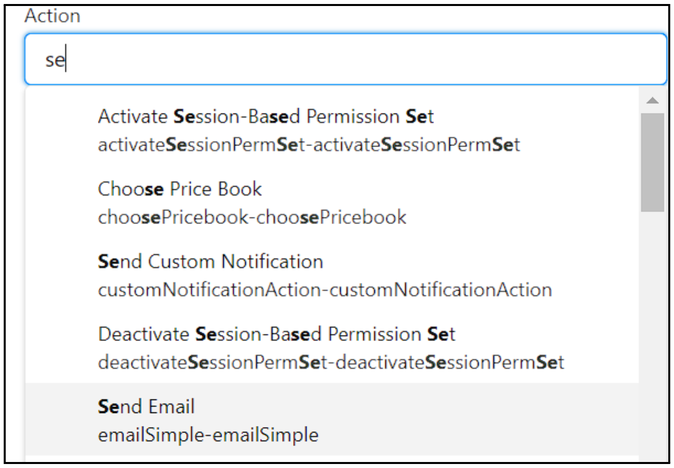




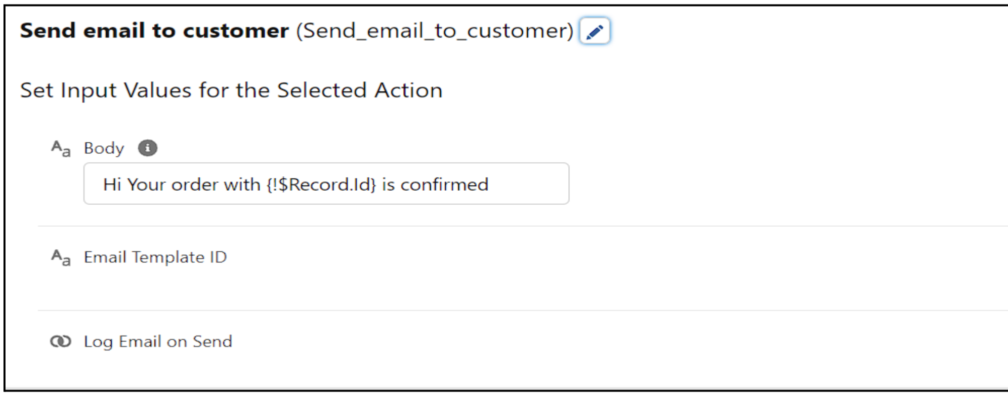
19. Now Below the Order status Click on add element and select Action as your element.

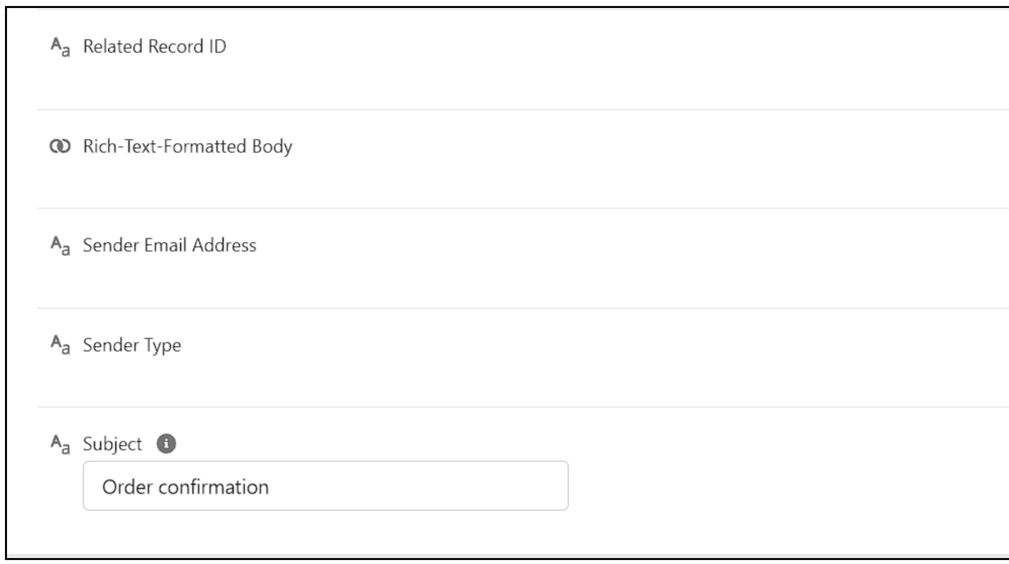


20. Now in action select Send email



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.





Trigger On Account To Prevent Duplicate Name

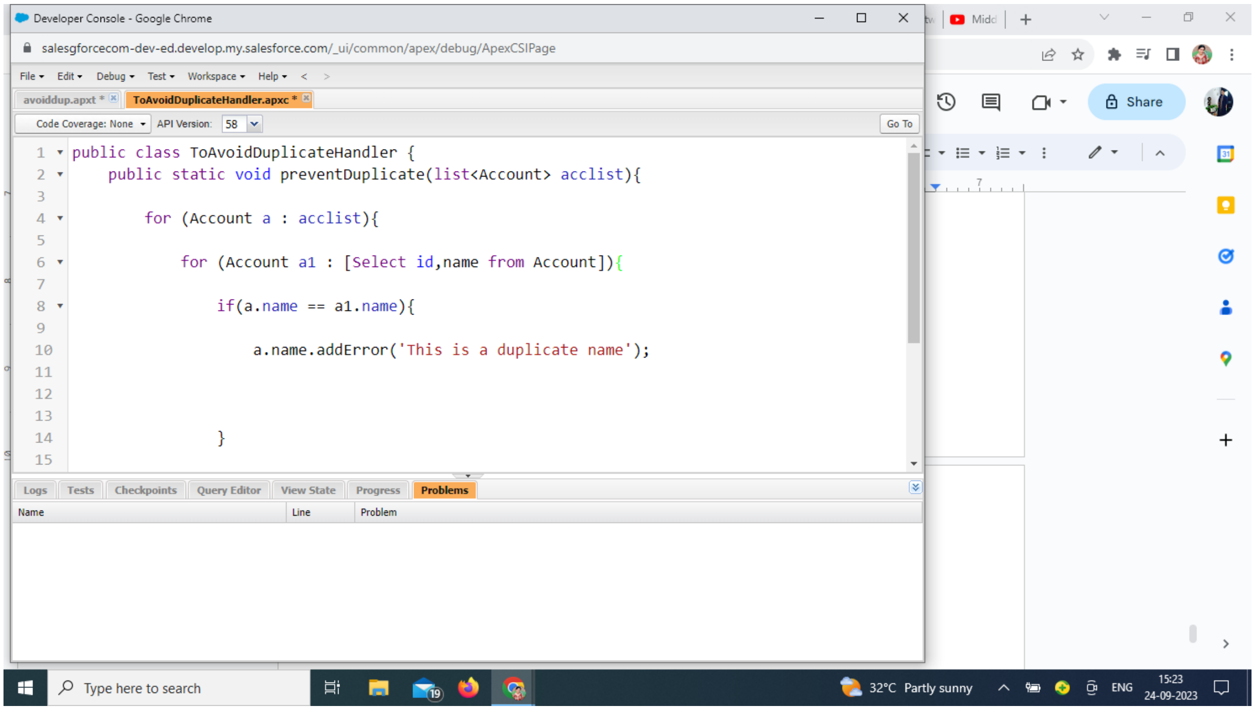
Trigger on Account to prevent Duplicate Name.

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

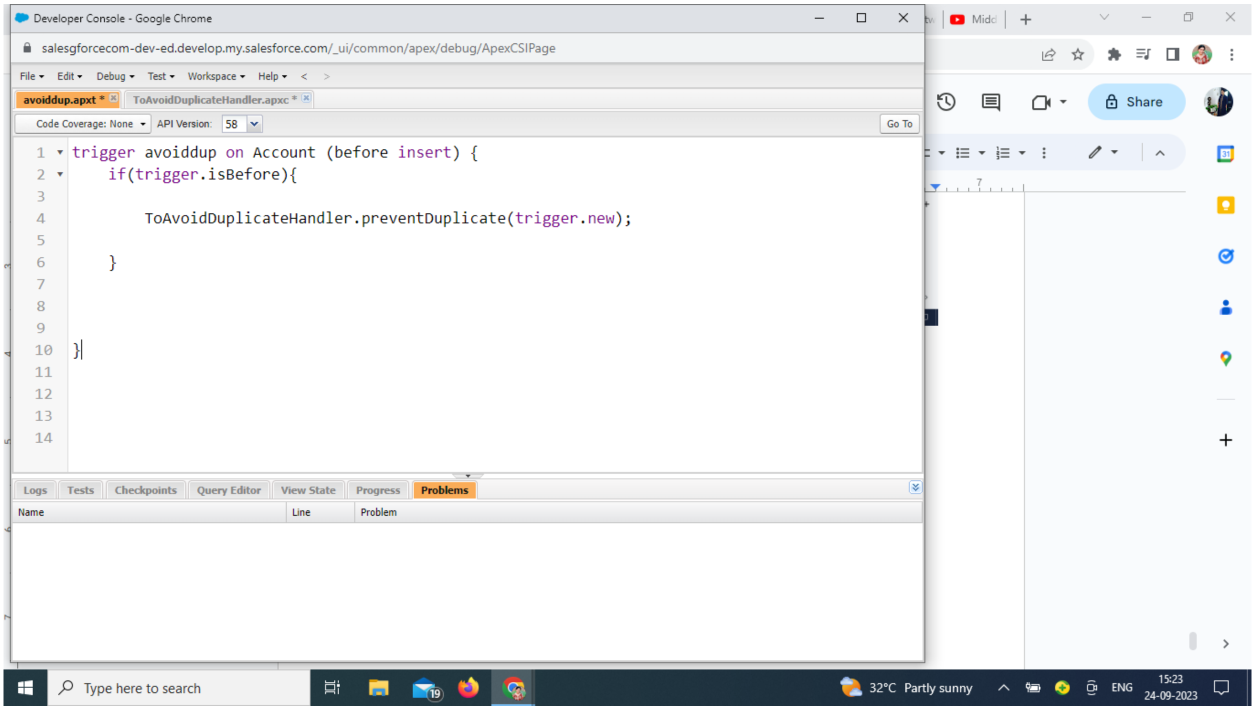
```
public class ToAvoidDuplicateHandler {
```

```
    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');



                }

            }

        }



    }

}
```



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
salesgforcecom-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
Go To
trigger avoiddup on Account (before insert) {
if(trigger.isBefore){
ToAvoidDuplicateHandler.preventDuplicate(trigger.new);
}
}
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
Name
Line
Problem
Share
Type here to search
32°C Partly sunny
ENG
15:23
24-09-2023